

PLEASE COMPLETE THE SHADED AREAS ONLY

Kings Park Financial Management (Scotland) Limited

URGENT MORTGAGE ENQUIRY

Please return in the FREEPOST envelope or by email or fax to

info@kpfm.co.uk

01786 479245

Completion of this questionnaire will allow us to prepare for your meeting so that your meeting can be both productive and interesting. The more accurate your information, the more effective the meeting can be.

By completing this information you will not be committed to using our service, and we will not be committed to working with you.

First time buyer	Mover	Buy to let	Unencumbered
Right to buy	Remortgage	Debt consolidation	New Build

PERSONAL DETAILS	Applicant 1	Applicant 2
Mr/Mrs/Miss		
Surname		
First Name(s)		
Previous/maiden name		
Date of name change		
Male/female		
Date of birth		
Anticipated retirement age		
Marital status		
Country on nationality		
Are you a permanent resident in UK		
Do you have permanent right to work in UK		
Three years address history		
Current address		
Post code		
Moved in/out	/ /	/ /
Previous address		
Post code		
Moved in/out	/ /	/ /
Please include other addresses in further information		
Home telephone number		
Work telephone number		
Mobile number		
Email address		
Number of financial dependants		
EMPLOYED APPLICANTS	Applicant 1	Applicant 2

Occupation		
Name of Employer		
Employers address		
Post Code		
Years/months with employer	/	/
Include 3 years employment details in additional info		
Type of contract	Permanent	Permanent
	Temporary	Temporary
Gross basic salary (Annual)	£	£
Overtime/bonus (Annual)	£	£
Is overtime/bonus guaranteed	Yes	No
	Yes	No

SELF EMPLOYED APPLICANTS	Applicant 1	Applicant 2
Occupation		
Name of Company		
Company address		
Post Code		
Date business established	/ /	/ /
Percentage shareholding		
Net Profit	This year	This year
	Last year	Last year
	Previous year	Previous year
Financial year end	/ /	/ /

CURRENT MORTGAGE DETAILS	Applicant 1	Applicant 2
Name of lender		
Mortgage account number		
Company address		
Post code		
Outstanding balance	£	£
Remaining term (months/years)	/	/
Date current mortgage started	/ /	/ /
Have you ever had any late payments	Yes No Details	Yes No Details
Have you ever had any late payments on any other mortgage	Yes No Details	Yes No Details
Are you tied to your lender	Yes No	Amount or redemption penalty £
When does penalty period end	/ /	
EXISTING LOANS	Applicant 1	Applicant 2
Loan/credit card		

Is this secured on the property	Yes		No		Yes		No			
Name of lender										
Account/card number										
Outstanding balance	£				£					
Monthly payment	£				£					
Date of final payment	/ /				/ /					
Have you ever had any late payments	Yes		No		Details	Yes		No		Details
Will this be repaid prior to new mortgage starting	Yes		No			Yes		No		
Loan/credit card										
Is this secured on the property	Yes		No		Yes		No			
Name of lender										
Account/card number										
Outstanding balance	£					£				
Monthly payment	£					£				
Date of final payment	/ /					/ /				
Have you ever had any late payments	Yes		No		Details	Yes		No		Details
Will this be repaid prior to new mortgage starting	Yes		No			Yes		No		
Loan/credit card										
Is this secured on the property	Yes		No		Yes		No			
Name of lender										
Account/card number										
Outstanding balance	£					£				
Monthly payment	£					£				
Date of final payment	/ /					/ /				
Have you ever had any late payments	Yes		No		Details	Yes		No		Details
Will this be repaid prior to new mortgage starting	Yes		No			Yes		No		
Have you ever been declared bankrupt										
Have you entered into a trust scheme to repay credit										

Name of existing bank				
Account number				
Sort code				
How long have you held this account	Years		years	
NEW MORTGAGE DETAILS				
Amount required	£		Value of property	
Term of mortgage	Years months		Are you happy to be tied in for a discounted period	
Type of product	Fixed		Tracker	
			Fixed/tracker period _____ years	

PROPERTY DETAILS									
Main residence	Yes		No		Is the property to be let	Yes		No	
Business use at property	Yes		No		New build	Yes		No	
					Self build	Yes		No	
Age of property (years)					Number of bedrooms				
Type of property	House				Flat	Number of floors			
	Detached								
	Semi detached				Above commercial property	Yes		No	
	Terraced				Purpose built or converted				
Construction (brick etc)	Yes		No		Was the property built by a local authority	Yes		No	
Is the property a new build	Yes		No						

PROTECTION									
<i>Life cover – this will provide protection should either you or your partner die *</i>									
Please arrange for applicant 1		Applicant 2		Joint		Declined			
<i>Life or earlier critical illness cover – this will provide protection should either you or your partner die or suffer but survive a critical illness*</i>									
Please arrange for applicant 1		Applicant 2		Joint		Declined			
<i>Income Protection cover-this will provide an income for the remaining term of the mortgage should you or your partner be unable to work due to accident of illness*</i>									
Please arrange for applicant 1		Applicant 2		Joint		Declined			
<i>Accident Sickness cover-your mortgage payments would be covered for a one or two year period should you or your partner be unable to work due to accident of illness*</i>									
Please arrange for applicant 1		Applicant 2		Joint		Declined			
<i>Unemployment cover-your mortgage payments would be covered for a one or two year period should you or your partner be made redundant*</i>									
Please arrange for applicant 1		Applicant 2		Joint		Declined			
<i>Buildings cover-this will be a mandatory condition of the mortgage and will protect the building against a number of perils*</i>									
Please arrange for me/us				I/we will arrange our own cover					
<i>Contents cover-this will protect your home contents against a number of perils*</i>									
Please arrange for me/us				I/we will arrange our own cover					

*Please see separate key feature documents for full terms and conditions.

Additional Information

Please add any details here that are relevant to your mortgage enquiry. Please remember to include details of 3 years address history and 3 years employment history

Agreement in principle - consent to use of data

If you would like an agreement in principle to a mortgage loan then it will be necessary for the selected mortgage lender to carry out some checks on the information you have provided. Please give your consent to checks, either by signing the form below, or by confirming your agreement to your financial adviser.

If you are applying in joint names and are providing personal details on behalf of the joint applicant, then you confirm that you have their consent for this agreement and that you will share with them the details of what you have agreed to on their behalf.

When assessing your application and managing your borrowing automated decision making systems may be used. You agree that when making credit decisions the selected mortgage lender may make searches at credit reference agencies, including electoral register information. These searches will be recorded by the credit reference agencies.

If you are applying in joint names with another, this will create a financial link between you in the records at the credit reference agencies. This means that your financial affairs and those of your joint applicant may be treated as affecting each other.

You understand that if false or inaccurate information is provided or fraud is suspected, the selected mortgage adviser may pass details to fraud prevention agencies and other relevant organisations. Law enforcement agencies may access and use this information. The selected mortgage lender and other organisations may use credit reference agency records about you and people financially linked to you and may also use records about you and others held with fraud prevention agencies to help make decisions

- for credit and credit related services, and to manage accounts,
- for checking details on proposals and claims for all types of insurance,
- for fraud prevention, debtor tracing, debt recovery, and to prevent money laundering, and
- for checking details of job applicants and employees.

The selected mortgage lender and other organisations may access and use from other countries the information recorded by fraud prevention agencies.

If you ask, the selected mortgage lender will tell you which credit reference and fraud prevention agencies they have used so you can get a copy of your details from them.

You should understand that an agreement in principle is not binding on either you or the selected mortgage lender.

If the selected mortgage lender agree the loan in principle and you wish to proceed with your application, then further checks will be needed.

You will need to complete a full application and sign a declaration giving consent to the additional checks and further uses of your personal information.

You agree that the selected mortgage lender may keep your personal details, given to them by you or other people during your relationship with them and other companies in their group, in their database. This includes details you give on application forms, during financial reviews and interviews, their analysis of your account transactions, and what they know from operating your accounts. Companies in the selected mortgage lenders group may use and update this centrally held information to provide you with services, to identify products and services which might be suitable for you, to assess lending and insurance risks, to recover

debts, to prevent and detect fraud, and to update their own records about you. They may also use your information for research and statistical analysis with the aim of improving their services.

All applicants must now sign below. If one applicant has completed the form on behalf of the joint applicant then one signature is acceptable. Alternatively, the applicant(s) should confirm their agreement to the financial adviser who should sign below.

Signature of Applicant 1

Date

Signature of Applicant 2

Date

Signature of Financial Adviser

Date

Financial adviser declaration

I confirm that I have read the notice above to the applicant(s), who have given their consent.

Kings Park Financial Management (Scotland) Limited
89 Barnton Street
Stirling
FK8 1HJ

Tel: 01786 471482
Fax: 01786 479245

Email: info@kpfm.co.uk
Website: www.kpfm.co.uk

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