

**CONFIDENTIAL FACT FIND DOCUMENT**

PLEASE COMPLETE THE INFORMATION ON THE FOLLOWING PAGES AS FULLY AND ACCURATELY AS POSSIBLE. THE INFORMATION YOU CONFIRM HERE WILL BE USED TO SUBMIT YOUR APPLICATION TO THE MORTGAGE LENDER WHO MAY DECLINE YOUR APPLICATION IF THE INFORMATION IS LATER FOUND TO BE INACCURATE.

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| DOCUMENTS  The following documents may assist you in completing this form and are also the most common documents requested by the lenders to support your application:   * Identification such as a passport or driving licence * Address proof such as a utility bill * Personal and business bank statements * Income details such as payslips or accounts * Evidence of deposit (for purchases) |

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| --- | --- | --- | --- |
| **ADVISER NAME** |  | **DATE** |  |
| **ADVISERS EMAIL ADDRESS** |  | | |

Adviser Use Only

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Case Introducer | |  | | | |
| Face to face meeting | | Yes |  | No |  |
| Application fee |  | Offer fee | |  | |
| Completion fee |  | Other fee | |  | |

**PLEASE RETURN THE FORM TO YOUR ADVISER BY EMAIL, FAX OR TO THE OFFICE ADDRESS BELOW**

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| **YOUR PERSONAL DETAILS** |

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| **Title** | **Mr** |  | **Mrs** | | |  | | **Miss** | | | |  | | | | | **Ms** | | |  | **Mr** |  | **Mrs** | | | | |  | | **Miss** | | | |  | | | **Ms** | | | |  | |
| **First name** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **Middle name/s** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **Surname** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **Any previous surname** |  | | | | | | **Date changed** | | | | | | |  | | | | | | |  | | | | | | | | **Date changed** | | | | | | |  | | | | | | |
| **Date of birth** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **Marital status** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **Dependants name/s and dates of birth** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **Nationality** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **Country of Birth** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **If not British, do you have permanent rights in the UK** | **Yes** | |  | | | | | | | **No** | | | | | | | |  | | | **Yes** | | | | |  | | | | | **No** | | | | | | | | |  | | |
| **If no, confirm visa expiry date** | | | | | | | | | | | | | | |  | | | | | **If no, confirm visa expiry date** | | | | | | | | | | | | | | | | |  | | | | |
| **Date residency started in UK?** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | |  | | |
| **National Insurance number** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **Home telephone number** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **Work telephone number** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **Mobile telephone number** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **Email address** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **Smoker** | **Yes** | | |  | | | | | **No** | | | | | |  | | | | | | **Yes** | | |  | | | | | | | | **No** | | | | | | |  | | | |
| **Home address** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **Postcode** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **Residential status** | **Owner** | |  | | **Tenant** | | | | | |  | | **Family** | | | | | |  | | **Owner** | | | |  | | **Tenant** | | | | | |  | | **Family** | | | | | | |  |
| **What date did you move here** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |
| **If tenant, provide landlords name and address** |  | | | | | | | | | | | | | | | | | | | |  | | | | | | | | | | | | | | | | | | | | | |

If you have not lived at this address for at least 3 years, please provide your previous addresses to give a complete 3-year history. If you do not currently live in the UK, please include your last known UK address even if this is over 3 years ago:

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Previous Address One** |  | | | | | |  | | | | | |
| **Residential status** | **Owner** |  | **Tenant** |  | **Family** |  | **Owner** |  | **Tenant** |  | **Family** |  |
| **Dates at this address** |  | | | | | |  | | | | | |

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Previous Address Two** |  | | | | | |  | | | | | |
| **Residential status** | **Owner** |  | **Tenant** |  | **Family** |  | **Owner** |  | **Tenant** |  | **Family** |  |
| **Dates at this address** |  | | | | | |  | | | | | |
| **Previous Address Three** |  | | | | | |  | | | | | |
| **Residential status** | **Owner** |  | **Tenant** |  | **Family** |  | **Owner** |  | **Tenant** |  | **Family** |  |
| **Dates at this address** |  | | | | | |  | | | | | |

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| **YOUR REGULAR PERSONAL OUTGOINGS** |

Please add here the total family spending on the following both currently and an estimate of the proposed cost per month if you are planning to move house. If you do not have a particular personal expenditure, e.g. your car costs are paid for by your company, or you live with family and do not pay towards the bills, please provide more detail in the notes section:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Item** | **Current Cost per month** | **Proposed cost per month** | **Item** | **Current Cost per month** | **Proposed cost per month** |
| **Rent payments (If applicable)** | £ | £ | **Car Insurance/s** | £ | £ |
| **Food** | £ | £ | **Car tax** | £ | £ |
| **Council Tax** | £ | £ | **Petrol** | £ | £ |
| **Gas and Electricity** | £ | £ | **Other travel costs** | £ | £ |
| **Water and Sewage** | £ | £ | **Property maintenance** | £ | £ |
| **Home phone/internet/TV** | £ | £ | **Ground rent or services** | £ | £ |
| **Mobile phone/s** | £ | £ | **Clothing** | £ | £ |
| **House Insurance** | £ | £ | **Pets** | £ | £ |
| **Childcare/Child maintenance** | £ | £ | **Gifts** | £ | £ |
| **School fees** | £ | £ | **Holidays** | £ | £ |
| **Health cover/costs** | £ | £ | **Leisure and entertainment** | £ | £ |
| **Life cover/other insurances** | £ | £ | **Tobacco or cigarettes** | £ | £ |
| **Pension (if not deducted from salary)** | £ | £ | **Gym membership** | £ | £ |
| **Savings** | £ | £ | **Other-**state what | £ | £ |

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| Notes |

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| **BANK DETAILS** |

Please confirm the details of **all** of the bank accounts you hold:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Account holder name** | **Name of Bank** | **Personal or Business account** | | | | **Sort code** | **Account number** | **Salary/income paid in here?** | | | | **To be used to pay mortgage?** | | | |
|  |  | Pers |  | Bus |  |  |  | Yes |  | No |  | Yes |  | No |  |
|  |  | Pers |  | Bus |  |  |  | Yes |  | No |  | Yes |  | No |  |
|  |  | Pers |  | Bus |  |  |  | Yes |  | No |  | Yes |  | No |  |
|  |  | Pers |  | Bus |  |  |  | Yes |  | No |  | Yes |  | No |  |
|  |  | Pers |  | Bus |  |  |  | Yes |  | No |  | Yes |  | No |  |
|  |  | Pers |  | Bus |  |  |  | Yes |  | No |  | Yes |  | No |  |
|  |  | Pers |  | Bus |  |  |  | Yes |  | No |  | Yes |  | No |  |

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| **YOUR ASSETS AND LIABILITIES** |

If you are the owner of the property you live in, please provide the following details.

|  |  |  |  |
| --- | --- | --- | --- |
| **Who is the current property owner/s?** |  | **What is your monthly mortgage payment?** |  |
| **What is the current property value?** |  | **What is your current interest rate and type?** |  |
| **Original purchase price of the property?** |  | **Repayment method e.g. Capital and Interest** |  |
| **What was your original date of purchase?** |  | **How long do you have left on the mortgage?** |  |
| **Who is the current mortgage lender?** |  | **Do you have any early repayment charges?** |  |
| **How much is the outstanding mortgage?** |  | **What date do these charges end?** |  |

Do you have any second charges or further advances secured against this property? If yes, please complete:

|  |  |  |
| --- | --- | --- |
|  | **Charge one** | **Charge two** |
| **Name of lender** |  |  |
| **Amount of loan** |  |  |
| **Monthly payment** |  |  |
| **Current interest rate** |  |  |
| **End date of loan** |  |  |

Do you own any other properties, for example second homes, buy to let properties or commercial property? If yes, please complete the portfolio details on the last page of this fact find.

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| **SAVINGS, INVESTMENTS AND SOURCE OF DEPOSIT** |

Please provide detail of any non-property assets you hold and indicate which are to be used towards your property:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Owner of Asset**  **e.g. self, partner or joint** | **Asset type. Include savings, pension, cars, investments etc** | **Value of asset** | **To be used towards a purchase?** | | | |
|  |  | £ | **Yes** |  | **No** |  |
|  |  | £ | **Yes** |  | **No** |  |
|  |  | £ | **Yes** |  | **No** |  |
|  |  | £ | **Yes** |  | **No** |  |
|  |  | £ | **Yes** |  | **No** |  |
|  |  | £ | **Yes** |  | **No** |  |

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| **OTHER DEBTS** |

Please provide detail of debts such as loans, credit cards and overdrafts but do not include mortgages in this section. Include credit cards without any balance and those you clear in full every month:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Owner** | **Type of debt** | **Provider** | **Amount outstanding** | **Monthly payments** | **Will this be cleared within 6 months?** |
|  |  |  | £ | £ |  |
|  |  |  | £ | £ |  |
|  |  |  | £ | £ |  |
|  |  |  | £ | £ |  |
|  |  |  | £ | £ |  |
|  |  |  | £ | £ |  |
| **PAST OR PRESENT CREDIT PROBLEMS** | | | | | |

It is important that you disclose to any new lender full details of any credit issues you may have had, so please complete the below:

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | ***Self*** | | | | ***Partner*** | | | |
| **Have you ever been late with any payments on a mortgage?** | Yes |  | No |  | Yes |  | No |  |
| **Have your payments been late in the last 2 years on a loan or credit card?** | Yes |  | No |  | Yes |  | No |  |
| **Have you ever received a default (court action warning letter)?** | Yes |  | No |  | Yes |  | No |  |
| **Have you ever received a County Court Judgement?** | Yes |  | No |  | Yes |  | No |  |
| **Have you ever been made bankrupt or had a property repossessed?** | Yes |  | No |  | Yes |  | No |  |
| **Have you been refused credit in the last 6 months?** | Yes |  | No |  | Yes |  | No |  |
| **Have you exceeded your credit card limit in the last 2 years?** | Yes |  | No |  | Yes |  | No |  |
| **Are you currently in an IVA or Debt Management Plan?** | Yes |  | No |  | Yes |  | No |  |

If you have answered ‘Yes’ to any of the above, please provide outline details below and please supply a copy of your credit report. This can be obtained from either of the following [www.equifax.co.uk](http://www.equifax.co.uk) or [www.experian.co.uk](http://www.experian.co.uk)

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| **DECLINED OR WITHDRAWN MORTGAGE APPLICATIONS** |

Have you applied for any mortgage in the last 12 months that has not gone ahead or not listed above? If yes, please provide full details including the lender, type of loan, loan size and reason for not proceeding:

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| **PROTECTING YOUR ASSETS** |

We strongly recommend you review any protection needs when you take on new credit commitments. Please provide the detail of any existing plans you hold to help with this review:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Person Insured** | **Name of insurer** | **Type of cover**  **e.g. life cover, illness cover** | **Plan end date** | **Amount of cover** | **Monthly cost** |
|  |  |  |  | £ | £ |
|  |  |  |  | £ | £ |
|  |  |  |  | £ | £ |
|  |  |  |  | £ | £ |
|  |  |  |  | £ | £ |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **I/we would like to review our protection needs** | Yes |  | No |  | Maybe |  |

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| **INCOME** |

Please confirm your sources of income and then complete the full income details in the relevant sector:

|  |  |  |  |
| --- | --- | --- | --- |
|  | | **Self** | **Partner** |
| **Income from an employed position where you are NOT the owner, shareholder or Director of the company** | If Yes, tick and complete Section One |  |  |
| **Income from a position where you are a Director, shareholder or owner of the company** | If Yes, tick and complete Section Two |  |  |
| **Other Income such as benefits, maintenance, pension or Investments** | If Yes, tick and complete Section Three |  |  |
| **Income from a property portfolio held in either your personal or limited company name** | If Yes, tick and complete Section Four |  |  |

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| **SECTION ONE - INCOME FROM EMPLOYED POSITION** |

|  |  |  |
| --- | --- | --- |
|  | **Self** | **Partner** |
| **What is your current occupation?** |  |  |
| **When did you start this job?** |  |  |
| **Is it a permanent position?** |  |  |
| **Name and address of your employer** |  |  |
| **Contact number for your employer** |  |  |

|  |  |  |
| --- | --- | --- |
| **Annual basic salary BEFORE tax** | £ | £ |
| **Average overtime income per year** | £ | £ |
| **Bonus income per year** | £ | £ |
| **Annual car or travel allowance** | £ | £ |
| **Other income from your employer** | £ | £ |

If you have been in this position for less than 12 months, please provide details of your previous employment/s

|  |  |  |
| --- | --- | --- |
| **Your previous occupation one** |  |  |
| **Start and end date of this employment?** |  |  |
| **Was this a permanent or contract position?** |  |  |
| **Name and address of this employer** |  |  |
| **Contact number for this employer** |  |  |
| **Your previous occupation two** |  |  |
| **Start and end date of this employment?** |  |  |
| **Was this a permanent or contract position?** |  |  |
| **Name and address of this employer** |  |  |
| **Contact number for this employer** |  |  |

If your current position is temporary or contract based, please also complete the following:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Current contract term** | **Start date** | |  | **Expected end date** |  | |
| **What is your current daily rate** | £ | **How long have you been contracting for in total?** | | | |  |
| **Previous contract one** | **Start date** | |  | **End date** |  | |
| **Previous contract two** | **Start date** | |  | **End date** |  | |

If you own your own business or at least 20% of the shares in a business, please complete the following for **each business** you earn income from. (Income from a property business should be completed in Section four):

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Business one** | **Self** | | | **Partner** | | |
| **What is the business name?** |  | | |  | | |
| **What is the nature of the business?** |  | | |  | | |
| **When was the business started?** |  | | |  | | |
| **What percentage of the company is yours?** |  | | |  | | |
| **What is the address of the business** |  | | |  | | |
| **What month is the business year end?** |  | | |  | | |
| **What is the status of the business?** | **Limited company** | |  | **Limited company** | |  |
| **Sole trader** | |  | **Sole trader** | |  |
| **Partnership** | |  | **Partnership** | |  |
| **What is the net profit for the business?**  **(*Net profit means the taxable income made after deducting your running expenses)*** | **2016 - Projected** | £ | | **2016 - Projected** | £ | |
| **2015** | £ | | **2015** | £ | |
| **2014** | £ | | **2014** | £ | |
| **2013** | £ | | **2013** | £ | |
| **For limited companies, please confirm your current taxable PAYE income if applicable** | £ | | | £ | | |
| **For limited companies, please confirm your dividend income drawn for each year if applicable** | **2016 - Projected** | £ | | **2016 - Projected** | £ | |
| **2015** | £ | | **2015** | £ | |
| **2014** | £ | | **2014** | £ | |
| **2013** | £ | | **2013** | £ | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Business two** | **Self** | | | **Partner** | | |
| **What is the business name?** |  | | |  | | |
| **What is the nature of the business?** |  | | |  | | |
| **When was the business started?** |  | | |  | | |
| **What percentage of the company is yours?** |  | | |  | | |
| **What is the address of the business** |  | | |  | | |
| **What month is the business year end?** |  | | |  | | |
| **What is the status of the business?** | **Limited company** | |  | **Limited company** | |  |
| **Sole trader** | |  | **Sole trader** | |  |
| **Partnership** | |  | **Partnership** | |  |
| **What is the net profit for the business?**  **(*Net profit means the taxable income made after deducting your running expenses)*** | **2016 - Projected** | £ | | **2016 - Projected** | £ | |
| **2015** | £ | | **2015** | £ | |
| **2014** | £ | | **2014** | £ | |
| **2013** | £ | | **2013** | £ | |
| **For limited companies, please confirm your current taxable PAYE income if applicable** | £ | | | £ | | |
| **For limited companies, please confirm your dividend income drawn for each year if applicable** | **2016 - Projected** | £ | | **2016 - Projected** | £ | |
| **2015** | £ | | **2015** | £ | |
| **2014** | £ | | **2014** | £ | |
| **2013** | £ | | **2013** | £ | |

Continue if you have further businesses...

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Business three** | **Self** | | | **Partner** | | |
| **What is the business name?** |  | | |  | | |
| **What is the nature of the business?** |  | | |  | | |
| **When was the business started?** |  | | |  | | |
| **What percentage of the company is yours?** |  | | |  | | |
| **What is the address of the business** |  | | |  | | |
| **What month is the business year end?** |  | | |  | | |
| **What is the status of the business?** | **Limited company** | |  | **Limited company** | |  |
| **Sole trader** | |  | **Sole trader** | |  |
| **Partnership** | |  | **Partnership** | |  |
| **What is the net profit for the business?**  **(*Net profit means the taxable income made after deducting your running expenses)*** | **2016 - Projected** | £ | | **2016 - Projected** | £ | |
| **2015** | £ | | **2015** | £ | |
| **2014** | £ | | **2014** | £ | |
| **2013** | £ | | **2013** | £ | |
| **For limited companies, please confirm your current taxable PAYE income if applicable** | £ | | | £ | | |
| **For limited companies, please confirm your dividend income drawn for each year if applicable** | **2016 - Projected** | £ | | **2016 - Projected** | £ | |
| **2015** | £ | | **2015** | £ | |
| **2014** | £ | | **2014** | £ | |
| **2013** | £ | | **2013** | £ | |

**ACCOUNTANTS DETAILS**

|  |  |  |
| --- | --- | --- |
| **Company name** |  |  |
| **Name of the accountant acting for you** |  |  |
| **Accountants Company address** |  |  |
| **Accountants telephone number** |  |  |
| **Accountants email address** |  |  |

If you are a director or shareholder of any other company not currently generating income, please provide more detail as below:

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Applicant Name** | **Company Name** | **Director** | | | | **Share-holding %** | **Reason why the company is not income producing?** |
|  |  | Yes |  | No |  |  |  |
|  |  | Yes |  | No |  |  |  |
|  |  | Yes |  | No |  |  |  |
| **SECTION THREE- INCOME FROM OTHER SOURCES** | | | | | | | |

Please provide information of income from other sources such as pension or benefits:

|  |  |  |
| --- | --- | --- |
|  | **Self** | **Partner** |
| **Private Pension income per year** | £ | £ |
| **State pension income per year** | £ | £ |
| **Income from investments or trusts per year** | £ | £ |
| **Working family tax credits per year** | £ | £ |
| **Child benefit per year** | £ | £ |
| **Other benefits – provide detail below** | £ | £ |
| **Other income– provide detail below** | £ | £ |

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| Income Notes |

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| **CHANGES OF CIRCUMSTANCES** |

Please confirm if you expect any changes to your circumstances over the next 5 years? For example:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Do you plan to have or increase the size of your family?** | **Yes** |  | **No** |  |
| **Is there any plans to change your job or how you work?** | **Yes** |  | **No** |  |
| **Do you plan to move country?** | **Yes** |  | **No** |  |
| **Do you plan to take on any more mortgages or credit commitments?** | **Yes** |  | **No** |  |

If yes, or if there are any other planned changes, please provide more detail below:

|  |
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| Notes |

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| **SECTION FOUR - INCOME FROM A RENTAL PORTFOLIO** |

Please complete the first section for a property portfolio held in your personal name:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **Self** | | **Partner** | |
| **When did you begin to let property?** |  | |  | |
| **What is YOUR SHARE of the net profit/loss from your properties as submitted to HMRC**  **(*Net profit means the taxable income made after deducting your running expenses from the rental income)*** | **2016 - Projected** | £ | **2016 - Projected** | £ |
| **2015** | £ | **2015** | £ |
| **2014** | £ | **2014** | £ |
| **2013** | £ | **2013** | £ |

Please complete this second section for a property portfolio held in the name of a limited company:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Self** | | **Partner** | | |
| **Name of Company** |  | |  | | |
| **When was the company formed?** |  | |  | | |
| **What percentage of the company is yours?** |  | |  | | |
| **What is the net profit for the business?**  **As submitted to HMRC**  **(*Net profit means the taxable income made after deducting your running expenses)*** | **2016 - Projected** | £ | **2016 - Projected** | | £ |
| **2015** | £ | **2015** | | £ |
| **2014** | £ | **2014** | | £ |
| **2013** | £ | **2013** | | £ |
| **Please confirm your current taxable PAYE income if applicable** | £ | | | £ | |
| **Please confirm your dividend income drawn for each year if applicable** | **2016 - Projected** | £ | | **2016 - Projected** | £ |
| **2015** | £ | | **2015** | £ |
| **2014** | £ | | **2014** | £ |
| **2013** | £ | | **2013** | £ |

**ACCOUNTANTS DETAILS**

|  |  |  |
| --- | --- | --- |
| **Company name** |  |  |
| **Name of the accountant acting for you** |  |  |
| **Accountants Company address** |  |  |
| **Accountants telephone number** |  |  |
| **Accountants email address** |  |  |

If you hold a property portfolio, the lender will expect that you have submitted details of any profits or losses to HMRC for tax purposes. If you have NOT for any reason submitted your accounting information to HMRC, it may be a requirement of the application that this is corrected. Where you have NOT yet submitted tax returns, please provide details below of your anticipated/projected profit or losses from your portfolio for each of the years you have held investment property and an explanation why they have not yet been submitted:

|  |
| --- |
| Notes |

|  |
| --- |
| **YOUR PROPERTY PORTFOLIO** |

|  |
| --- |
| **IF ALL OF THIS INFORMATION IS CONTAINED ON YOUR OWN EXISTING SPREADSHEET, YOU CAN SEND THIS TO US INSTEAD OF COMPLETING THE BELOW** |

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Property address** | **Owner/s**  **e.g.**  **Self, Partner or Joint** | **Current property value** | **Mortgage lender** | **Original purchase date** | **Outstanding mortgage**  **Balance** | **Current interest rate** | **Monthly mortgage payment** | **Repayment method e.g. interest only** | **Remaining mortgage term** | **Do you have any early repayment fees** | **What is the monthly rent** |
|  |  | £ |  |  | £ | % | £ |  |  |  | £ |
|  |  | £ |  |  | £ | % | £ |  |  |  | £ |
|  |  | £ |  |  | £ | % | £ |  |  |  | £ |
|  |  | £ |  |  | £ | % | £ |  |  |  | £ |
|  |  | £ |  |  | £ | % | £ |  |  |  | £ |
|  |  | £ |  |  | £ | % | £ |  |  |  | £ |
|  |  | £ |  |  | £ | % | £ |  |  |  | £ |
|  |  | £ |  |  | £ | % | £ |  |  |  | £ |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **How many additional properties do you hope to add to your existing portfolio over the next 12 months?** | **Self** |  | **Partner** |  |
| **Would you like a review of your portfolio to make sure the finance is arranged in the most effective way?** | **Self** |  | **Partner** |  |