

Branch

Source

Date

PERSONAL DETAILS		
	Applicant 1	Applicant 2
Title		
Forename(s) <i>(incl. middle names)</i>		
Surname		
Previous name (& date changed)		
Date of birth		
Full Current Address (to include town / location)		
Postcode		
Residential status		
Date moved to current address		
On voters roll?		
<i>If less than 3 years at current address, please provide full details of your previous addresses and dates of stay</i>		
Previous address(es) <i>(if applicable)</i>		
Previous addresses <i>(continued)</i>		
Previous residential status		
Date moved to previous address		
Marital status		
Relationship between borrowers		
Names & dates of birth of children		
Nationality		
If non UK/EU, visa status?		
Mother's maiden surname		
Main bank & years account held		
National Insurance number		

CONTACT DETAILS		
Mobile telephone		
Home telephone		
Work telephone		
E-Mail address		

CREDIT HISTORY		
Have you applied for a mortgage in the last 6 months? If so, please provide details. Please also detail any prior repossessions or mortgage arrears?		

Pacitti Jones
Mortgage enquiry form

Have you ever been in arrears, missed or defaulted on any payments or been involved in court proceedings, including CCJ's or voluntary arrangements? Please provide full details, dates & amounts.		
--	--	--

OCCUPATION & INCOME		
Occupation		
Name of employer		
Employment contract type		
Start date of employment		

EMPLOYED		
Gross basic annual income	£	£
Overtime - guaranteed/irregular	£	£
Bonus - guaranteed/ irregular	£	£
Student loans/childcare vouchers	£	£
Typical net monthly income	£	£

SELF EMPLOYED (INCLUDES DIRECTORS WITH GREATER THAN 20% STAKE)		
Please detail last 3 years net profit or dividend/salary figures	Latest year £ Previous £ Previous £	Latest year £ Previous £ Previous £

ADDITIONAL INCOME		
Please detail any additional income (i.e. child benefits / tax credits)	£	£

LOANS, CREDIT CARDS, CAR FINANCE, CHILDCARE ETC COSTS						
Applicant	Type	Provider	Payment	Balance	Time remaining	To continue
			£	£		
			£	£		
			£	£		
			£	£		
			£	£		
			£	£		
			£	£		
			£	£		
			£	£		
			£	£		
			£	£		
			£	£		
			£	£		

Pacitti Jones
Mortgage enquiry form

NEW MORTGAGE DETAILS	
Purchase price / Full market value	£ Value £
Deposit	£
Source of deposit (see below)	
Amount of mortgage required	£
Term of the new mortgage	
Product preference & term	Fixed / Tracker 2 / 3 / 5 / 10 years

ABOUT YOUR PROPERTY			
Address of property to be mortgaged			
Property type		Extra info re flat	
Surveyor details		Date of Home Report Refresh required?	Yes / No
HR value		Specialist reports?	

CURRENT MORTGAGE		
Lender		
Current property value	£	
Outstanding balance	£	
Monthly mortgage repayment	£	
Remaining term		
Current interest rate		
Is mortgage/property to be repaid/sold?		
Do early repayment charges apply?		
Is mortgage portable to new property?	Yes No	Yes No
Existing property status		
Do you have any other mortgages? (If so, please detail in Additional Notes)		

SAVINGS, INVESTMENTS, PROTECTION AND RETIREMENT PLANNING	
Please detail any existing savings and/or source of funds for deposit. Please detail any existing protection policies such as Life Insurance, Critical Illness or Income Protection., Please also outline current pension provisions.	

Monthly Budget

Monthly Household Income	
---------------------------------	--

Description	Current Expenses	Anticipated Expenses
Mortgage/Rent		
Factor fees		
Loan/HP/PCP payments		
Credit card payments		
Life insurance & Income protection		
Home insurance		
Regular savings		
Council tax		
Utilities (Gas/Electricity)		
Telephone/Mobile/Broadband		
TV Licence/Digital/Satellite/Cable		
Travel expenses/Fuel		
Car insurance/Tax/Servicing		
Childcare/Nursery/Schooling		
Maintenance		
Food/Housekeeping		
Clothes/Holidays/Entertainment		
Other expenses		
Total		
Disposable Income		

Amount available to meet mortgage and protection costs: £

CLIENT DECLARATION

I/We confirm that the information I/we have provided is, to the best of my/our knowledge correct. I/we have provided this information on the understanding that it is used to form the basis of any advice and recommendation made. I/we are not under any obligation to take up any recommendations made.

Please note that Pacitti Jones offer full advice and personal recommendation service for mortgage and protection business.

In order that Pacitti Jones may assist you regarding your mortgage and protection requirements, it is essential that you provide current and relevant information. Please therefore complete as comprehensively as you are able.

If you do not wish to disclose certain personal/financial information, please indicate in the relevant section. You should be aware that this may prevent an adviser from being able to identify areas where it might have been appropriate to make recommendations, or which could have an effect on the recommendations that have been made. Please understand that Pacitti Jones reserve the right to decline to give advice if full information is not provided.

Pacitti Jones
Mortgage enquiry form

Only with your express consent, may we approach a lender upon your behalf to secure an agreement in principle; this will involve a credit check which may record a footprint on your credit history.

Print name as digital signature

Print name as digital signature

Date completed

ADDITIONAL NOTES AS APPLICABLE