

Loan Enquiry



BROKER DETAILS

Name	<input type="text"/>	Telephone	<input type="text"/>
Firm	<input type="text"/>	Email address	<input type="text"/>
FCA no.	<input type="text"/>	Service required	<input type="radio"/> Referral <input type="radio"/> Packager service only

Disclaimer

THINK CAREFULLY BEFORE SECURING OTHER DEBTS AGAINST YOUR HOME. YOUR HOME MAYBE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON A MORTGAGE OR ANY OTHER DEBT SECURED ON IT. Loans are subject to status and affordability checks. Loans are secured on property. Calls may be recorded for training purposes. By ticking this box you are confirming that you have gained consent from your clients to their data being passed to us and they have given Smart Money Ltd authority to carry out a 'soft' credit search.

LOAN DETAILS AND PREFERENCES

Amount required	£ <input type="text"/>	Is the ability to make overpayments important to you?	<input type="radio"/> Yes <input type="radio"/> No
Reason for referral	<input type="text"/>	Monthly budget	£ <input type="text"/>
Repayment period	<input type="text"/>	Is the lowest initial cost important to you?	<input type="radio"/> Yes <input type="radio"/> No
For terms into retirement, please state how the loan will be affordable	<input type="text"/>	Would you like to pay your loan off early?	<input type="radio"/> Yes <input type="radio"/> No
Purpose of loan	<input type="text"/>	How and when would you repay the loan?	<input type="text"/>
Repayment type	<input type="radio"/> Capital and interest <input type="radio"/> Interest only	How important is the speed at which the funds are paid to you?	<input type="radio"/> Higher <input type="radio"/> Lower
If interest only, how will it be repaid?	<input type="text"/>	Which of the above is your greatest priority?	<input type="text"/>
Loan type	<input type="radio"/> Fixed <input type="radio"/> Variable		

APPLICANT DETAILS

Applicant 1

Forename(s)	<input type="text"/>
Surname	<input type="text"/>
Date of birth	<input type="text"/> DD/MM/YYYY
Marital status	<input type="text"/> Maiden name <input type="text"/>
No. of dependents	<input type="text"/> Ages <input type="text"/>
Home telephone	<input type="text"/>
Mobile telephone	<input type="text"/>
Work telephone	<input type="text"/>
Email Address	<input type="text"/>
Current address	<input type="text"/>
Postcode	<input type="text"/>

(Below is only applicable if you have lived at the current address less than 3 years)

Previous address	<input type="text"/>
Postcode	<input type="text"/>

Applicant 2

Forename(s)	<input type="text"/>
Surname	<input type="text"/>
Date of birth	<input type="text"/> DD/MM/YYYY
Marital status	<input type="text"/> Maiden name <input type="text"/>
No. of dependents	<input type="text"/> Ages <input type="text"/>
Home telephone	<input type="text"/>
Mobile telephone	<input type="text"/>
Work telephone	<input type="text"/>
Email Address	<input type="text"/>
Current address	<input type="text"/>
Postcode	<input type="text"/>

(Below is only applicable if you have lived at the current address less than 3 years)

Previous address	<input type="text"/>
Postcode	<input type="text"/>

INCOME DETAILS

Applicant 1

- Employed Self employed Retired
 Partnership Sole trader LTD Company

Occupation

Name of employer / Business

Time in occupation

Employed annual income PA Gross

Employed monthly net PM

S/E Net Profit PA

S/E Salary + dividends PA

Annual income (other) PA

Other source

Balance on unsecured debt Payments per month

Any CCJs, defaults or mortgage arrears in the last 12 months?
 Yes No

If yes, please provide details

Applicant 2

- Employed Self employed Retired
 Partnership Sole trader LTD Company

Occupation

Name of employer / Business

Time in occupation

Employed annual income PA Gross

Employed monthly net PM

S/E Net Profit PA

S/E Salary + dividends PA

Annual income (other) PA

Other source

Balance on unsecured debt Payments per month

Any CCJs, defaults or mortgage arrears in the last 12 months?
 Yes No

If yes, please provide details

SECURITY DETAILS

Address

Postcode

Is this the main residence? Yes No

Is the property ex-council? Yes No

Date of purchase

Purchase price

Present value

Property type

Title tenure Freehold Leasehold Feudal

Year built

Number of Bedroom(s) Reception(s)

Bathroom(s) Garage(s)

MORTGAGE DETAILS

Main Residence

Lender

Balance

Interest rate Time Left on Deal

Payment PM

Repayment type C&I Int only

Mortgage account no.

Term remaining Time with Lender

2nd Property / Secured Loan

Lender

Balance

Interest rate Time Left on Deal

Payment PM

Repayment type C&I Int only

Mortgage account no.

Term remaining Time with Lender

NOTES