

Client Questionnaire

Your Full Name(s): 1.	
2.	
Your Home Address:	
Home Tel No:	
Work Telephone No:	
Work Fax No:	
Mobile Tel No:	
E-Mail Address:	
National Insurance Nos: 1.	
2.	
Your Occupation(s): 1.	
2.	

Name, Address and Account Number of the Bank/ Building Society from which you will be supplying us any funds or to which we will be required to send any surplus funds from the transaction.



PURCHASES

If you are obtaining a loan/mortgage, please provide the name and address of your lender or loan arranger.

ALTERATIONS TO PROPERTIES

In connection with the purchase of a property, please let us know where there is any evidence of the property having been altered or extended at any time. We will need to ensure, on your behalf, that any necessary planning permissions or building regulation approvals have been obtained. The same will apply to any alterations or additions to the electricity supply to the property, replacement windows or the installation of a new boiler.

SALES

Please provide the names and ages of all occupiers of the property over the age of 17 years and their relationship to you.

If your property is mortgaged, please provide the name, address and account number of your lender.

If there is more than one mortgage on the property, please provide these details for all lenders.



If the property is not mortgaged, please provide us with details of the whereabouts of the title deeds.



If you have any other relevant details please use the space provided here.