

**Sale & Purchase questionnaire & information sheet**

Please complete as fully as possible.

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| **All about you** |
|  | **Client 1** | **Client 2** |
| **Title** |  |  |
| **Surname** |  |  |
| **Maiden name****(if applicable)** |  |  |
| **Forenames** **(inc. middle names)** |  |  |
| **Date of birth** |  |  |
| **National Insurance No.** |  |  |
| **Current address** |  |  |
| **Correspondence address****(if different)** |  |  |
| **Email address** |  |  |
| **Home contact no.** |  |  |
| Can we contact you here and when would be the best times? | Yes/No | Yes/No |
| **Work contact no.** |  |  |
| Can we contact you here and when would be the best times? | Yes/No | Yes/No |
| **Mobile contact no.** |  |  |
| Can we contact you here and when would be the best times? | Yes/No | Yes/No |

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| **All about your sale** |
| **Address of property to be sold.** |  |
| **Sale price** | £ |
| **Does the sale price include any specific items? If yes, please list.** |  |
| **Have you agreed to sell anything separately? If yes, please list with price.** |  |
| **Which Estate Agent have you agreed the sale through?** |  |
| **Estate Agents address** |  |
| **Estate Agents telephone number** |  |
| **Who should we speak with there?** |  |
| **Do we have your authority to settle their invoice from the proceeds of sale and what total fee have you agreed with them?** | Yes/No% plus VAT OR£ total |
| **Please provide the full names and ages of anyone other than yourselves residing at the property over the age of 17.** |  |

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| **All about your purchase** |
| **Address of property to be purchased.** |  |
| **Purchase price** | £ |
| **Does the purchase price include any specific items? If yes, please list.** |  |
| **Have you agreed to purchase anything separately? If yes, please list with price.** |  |
| **Which Estate Agent have you agreed the purchase through?** |  |
| **Estate Agents address** |  |
| **Estate Agents telephone number** |  |
| **Who should we speak with there?** |  |
| **Will you require an independent survey?**(NB. Separate to a mortgage survey if you require a mortgage) | Yes/No |
| **Please provide the full names and ages of anyone other than yourselves residing at the property over the age of 17.** |  |
| **What completion date do you have in mind?** |  |
| **To assist us in ensuring we do a thorough job for you, please let us know your intentions for the property.**(E.g. Do you intend to build on the property or alter it in any way or let it out at a later date?) |  |
| **Please also let us know if there is anything particularly important which made you choose to purchase the property.**(I.E. A view across countryside or a hot tub in the garden) |  |
| **Do you have any questions you would wish to raise about the property?** |  |

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| **Finally, the finance.** |
| **Is the property currently mortgaged?** | Yes/No |
| **If the answer is yes:** |
| **Who is your lender?** |  |
| **What is your lenders address?** |  |
| **What is your Mortgage Account Number?** |  |
| **Approximately how much is outstanding?** | £ |
| **Do you have any other loans secured against the property and if so please provide details of their name, address and account number?** | Yes/No |
| **Do we have your authority to obtain up to date redemption statements from all the Lenders you have given us details of?** | Yes/No |

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| **Do you require a mortgage to purchase the new property?** | Yes/No |
| **If the answer is yes:** |
| **Which lender will you likely be using?** |  |
| **Approximately how much will you be borrowing?** |  |
| **Are any balance funds coming from your savings and how much?** |  |
| **Are any balance funds coming from a loan or gift from a relative and how much?** |  |
| **Which Financial Advisor are you using to arrange your mortgage?** |  |
| **Financial Advisors address** |  |
| **Financial Advisors telephone number** |  |
| **Who should we speak with there?** |  |
| **Are any funds coming from your savings and how much?** |  |
| **Are any funds coming from a loan or gift from a relative and how much?** |  |

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| Signed (Client 1)……………………………………………………..……………. Dated ……………….………Signed (Client 2)…………………………………………………………………… Dated ……………….……… |
| * If there is more than one purchaser of the property, each one of you must sign this form.
* If you need more space, please use another sheet of paper.
* If anything changes after you fill in this questionnaire, please tell us immediately.
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