

# Enquiry Form

P01

## Section 1: Introducer Details

Introducer name:	<input type="text"/>	Introducer company:	<input type="text"/>
Address:	<input type="text"/>		
Postcode:	<input type="text"/>	FCA number:	<input type="text"/>
Telephone number:	<input type="text"/>	Mobile number:	<input type="text"/>
Email address:	<input type="text"/>	Network:	<input type="text"/>

I confirm that the information contained within this application is true and correct to the best of my knowledge. I have the client's authority to share this information.

Introducer signature:	<input type="text"/>	Date:	<input type="text"/> / <input type="text"/> / <input type="text"/>
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## Section 2: Loan Requirements

Type of loan:	Purchase <input type="checkbox"/>	Re-mortgage <input type="checkbox"/>	Second Mortgage <input type="checkbox"/>
Type of security:	Buy to let/HMO <input type="checkbox"/>	Land/Development Site <input type="checkbox"/>	Residential Refurbishment <input type="checkbox"/>
	Commercial property for own business to trade from <input type="checkbox"/>	Semi-Commercial/Commercial Property for investment <input type="checkbox"/>	
Finance required:	Term loan (i.e. 3-30 years) <input type="checkbox"/>	Bridging loan (i.e. 1-24 months) <input type="checkbox"/>	Development finance <input type="checkbox"/>

### Entity Applying for Finance

Personal name:	<input type="text"/>	Limited company/partnership	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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If yes to Limited company/partnership please provide;

Company name:	<input type="text"/>	Company number:	<input type="text"/>
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SSAS/SIPP	Yes <input type="checkbox"/>	No <input type="checkbox"/>	If yes please provide name:	<input type="text"/>
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Trust	Yes <input type="checkbox"/>	No <input type="checkbox"/>	If yes please provide name:	<input type="text"/>
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Loan amount required:	£ <input type="text"/>	Loan term required:	<input type="text"/>
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Purpose of loan/ summary of deal:	<input type="text"/>
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Repayment type preferred:

Interest only:  Capital repayment:  Part capital repayment  Retained:  Rolled:

If interest only loan or a bridging loan is requested, how will it be repaid at the end of the term?

Have the applicants ever rolled a property/an interest in a property?

Completion required by:

Have you approached any lenders directly?

Yes  No

If yes please confirm who:

Fixed rate required?

Yes  No

### Section 3: Applicant Details

1st Applicant

2nd Applicant

Title:

Title:

First name:

First name:

Surname:

Surname:

Date of birth:  /  /

Date of birth:  /  /

Marital status: Single:  Married:

Divorced:  Living Together:

Separated:  Widowed:

Marital status: Single:  Married:

Divorced:  Living Together:

Separated:  Widowed:

Home Address:

Home Address:

Postcode:

Postcode:

Time at current address: Years:  Months:

Time at current address: Years:  Months:

Previous address: (If less than 3 at current)

Previous address: (If less than 3 at current)

Postcode:

Postcode:

Time at current address: Years:  Months:

Time at current address: Years:  Months:

If this does not cover years, please provide further details in additional info (Section 7)

If this does not cover years, please provide further details in additional info (Section 7)

Residential status: Homeowner  Tenant

Living with relatives

Residential status: Homeowner  Tenant

Living with relatives

Does the applicant own their own home:

Does the applicant own their own home:

Value:

Value:

Mortgage outstanding if applicable:

Mortgage outstanding if applicable:

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Nationality:	<input type="text"/>	Nationality:	<input type="text"/>
Home telephone no:	<input type="text"/>	Home telephone no:	<input type="text"/>
Mobile no:	<input type="text"/>	Mobile no:	<input type="text"/>
Employment status:	Employed: <input type="checkbox"/> Self employed: <input type="checkbox"/>	Employment status:	Employed: <input type="checkbox"/> Self employed: <input type="checkbox"/>
Gross annual income:	<input type="text"/>	Gross annual income:	<input type="text"/>
Net annual income:	<input type="text"/>	Net annual income:	<input type="text"/>

Has the client ever had any of the following registered against themselves or a business they are involved in?

- Mortgage Arrears
- Defaults
- County Court Judgement
- Declared bankrupt?
- Entered into an IVA/CVA?
- Entered into a Debt Management Plan
- Missed payments on unsecured credit?
- Had a company go into liquidation?

If answered yes to any of the above questions, please provide full details in **section 5**

**Section 4: Security Details** If you have any additional securities, please provide details in the **section 5**

Property description:	<input type="text"/>	Value:	<input type="text"/>
Address:	<input type="text"/>	Purchase price:	<input type="text"/>
		Original price: if applicable	<input type="text"/>
Year built:	<input type="text"/> / <input type="text"/> / <input type="text"/>	Original purchase date:	<input type="text"/> / <input type="text"/> / <input type="text"/>
Lender:	<input type="text"/>	Mortgage balance: outstanding against security	<input type="text"/>
Explanation for any increase in value since purchased:	<input type="text"/>		
Property type: (please provide full description)	<input type="text"/>		
Property tenure:	Freehold <input type="checkbox"/>	Feuhold <input type="checkbox"/>	Leasehold <input type="checkbox"/>
If Leasehold: (please confirm)	Lease Term: <input type="text"/>	Ground rent: <input type="text"/>	Service charge remaining: <input type="text"/>
Do applicants own any share of the freehold, please confirm percentage either personally or in another entity?	<input type="text"/>		
Details of any known restrictions and covenants to the property	<input type="text"/>		

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Is the property standard construction? Yes  No  Any history of flooding? Yes  No

Is it a listed building? Yes  No  Is the property in a finished condition? Yes  No

If no to 'is the property in a finished condition' please provide details:

Do applicants own any adjoining properties or properties within the same block?  
(If yes please provide details)

Do applicants plan to make any changes to the property?  
(if yes please provide details of schedule of works, the cost of the works, how long will the work take, will this increase the value, is planning permission required and is it currently in place)

Please provide brief overview of experience in completing similar projects

**Applicable if property to be used as a BTL/HMO**

Number of tenants:  Number of ASTs:  Monthly rental Income expected/achieved:

If the property will be let to multiple tenants is an HMO Licence in place? (if required)

Will it be let to: Local Authority  Will any relatives occupy 40% or more of the property? Yes  No   
Housing Association

If the property is a block of flats, please confirm the number of units and whether they are all on one freehold title currently:  Do applicants manage the property themselves?   
(If no please provide the following)

Managing agent name:  Fees charged:

Applicants ever lived in the property?  Was the property inherited: Yes  No

If yes, please provide dates:

**Applicable if Commercial/Semi Commercial Property**

Current property use:  Name of current tenant:   
If multiple tenants, please provide info on additional details page

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Tenancy start date:  /  /

Tenancy expiry date  /  /

Details of any break clauses:

Rent paid

Frequency rent is paid  
(i.e. monthly/quarterly)

Date of next rent review

Do applicants manage the property themselves?

Yes

No

If no please provide the following:

Name of management agent:

Fees charged:

**If the loan required if on a development site, please provide us with a full development appraisal and costings along with a personal CV detailing experience, architects plans and drawings, copy of planning permission and details of contractors.**

### Section 5: Additional Details

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## Section 6: Property Portfolio

If all of the below information is contained on your own existing spreadsheet, you can send this to us instead of completing this page.

Address	Value	Property type	Tenancy type	Tenancy length	Monthly rent	Mortgage payment	Fix or cap end date
	£	Residential	<input type="checkbox"/> Lease	<input type="checkbox"/>	£		
	Date purchased	Commercial	<input type="checkbox"/> License	<input type="checkbox"/> Tenancy details	Mortgage provider	Currently interest rate	Early redemption penalties
	Purchase price	HMO	<input type="checkbox"/> AST	<input type="checkbox"/>	£		
	£				Mortgage balance	Interest rate type	
					£		

Address	Value	Property type	Tenancy type	Tenancy length	Monthly rent	Mortgage payment	Fix or cap end date
	£	Residential	<input type="checkbox"/> Lease	<input type="checkbox"/>	£		
	Date purchased	Commercial	<input type="checkbox"/> License	<input type="checkbox"/> Tenancy details	Mortgage provider	Currently interest rate	Early redemption penalties
	Purchase price	HMO	<input type="checkbox"/> AST	<input type="checkbox"/>	£		
	£				Mortgage balance	Interest rate type	
					£		

Address	Value	Property type	Tenancy type	Tenancy length	Monthly rent	Mortgage payment	Fix or cap end date
	£	Residential	<input type="checkbox"/> Lease	<input type="checkbox"/>	£		
	Date purchased	Commercial	<input type="checkbox"/> License	<input type="checkbox"/> Tenancy details	Mortgage provider	Currently interest rate	Early redemption penalties
	Purchase price	HMO	<input type="checkbox"/> AST	<input type="checkbox"/>	£		
	£				Mortgage balance	Interest rate type	
					£		

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## Property Portfolio continued

Address	Value	Property type	Tenancy type	Tenancy length	Monthly rent	Mortgage payment	Fix or cap end date
	£	Residential	<input type="checkbox"/> Lease	<input type="checkbox"/>	£		
	Date purchased	Commercial	<input type="checkbox"/> License	<input type="checkbox"/> Tenancy details	Mortgage provider	Currently interest rate	Early redemption penalties
	Purchase price	HMO	<input type="checkbox"/> AST	<input type="checkbox"/>	£		
	£				£		

Address	Value	Property type	Tenancy type	Tenancy length	Monthly rent	Mortgage payment	Fix or cap end date
	£	Residential	<input type="checkbox"/> Lease	<input type="checkbox"/>	£		
	Date purchased	Commercial	<input type="checkbox"/> License	<input type="checkbox"/> Tenancy details	Mortgage provider	Currently interest rate	Early redemption penalties
	Purchase price	HMO	<input type="checkbox"/> AST	<input type="checkbox"/>	£		
	£				£		

Address	Value	Property type	Tenancy type	Tenancy length	Monthly rent	Mortgage payment	Fix or cap end date
	£	Residential	<input type="checkbox"/> Lease	<input type="checkbox"/>	£		
	Date purchased	Commercial	<input type="checkbox"/> License	<input type="checkbox"/> Tenancy details	Mortgage provider	Currently interest rate	Early redemption penalties
	Purchase price	HMO	<input type="checkbox"/> AST	<input type="checkbox"/>	£		
	£				£		

**Total number of properties owned:** 
**Total mortgages outstanding:** 
**Total monthly rent:** £ 
**Total value:** £

(If more than 8 properties please provide extra sheet or full details in spreadsheet format)

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## Section 7: Additional Details

## Section 8: Declaration

I have advised the applicant(s) that a formal credit search may be carried out in their name(s) with credit reference agencies who will record details of the search and may create a financial association with those with whom they are linked financially. The applicant(s) has/have given authority to my company to instruct Vantage Finance to carry out a formal credit search and/or to instruct others to do so in connection with obtaining finance on their behalf.

Print name:

Date:  /  /

Signature:

My client has not given authority to do a credit search at this stage

**Click here** to complete the form

Please review the information you have entered and click the above link to email this form back to Vantage Finance.

**Your home may be repossessed if you do not keep up repayments on your mortgage or other debts secured on it.**  
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