

CONFIDENTIAL CLIENT QUESTIONNAIRE

Additional Properties

Please use a separate page for each property

Your Full Name

Other Properties either of you owns

Address

In whose name is the property registered?

You Your (former) partner Joint

Local Authority (London Borough)

Type

flat terraced semi-detached detached

Number of bedrooms

Number of reception rooms

Date of purchase

Original: purchase price

£

mortgage

£

mortgage lender

Contributions to purchase price/deposit

You

£

Your (former) partner

£

Have you carried out major improvements (new kitchen or bathroom, extensions, loft conversions? Who paid for it?

Who paid the mortgage?

You Your (former) partner Joint

Who is paying it now?

You Your (former) partner Joint

Monthly mortgage payments

£

Current: value

£

mortgage balance

£

mortgage lender

Any other loans secured on your home

Type of mortgage

Repayment Interest only (Endowment)

If interest only: details of investments, such as endowment policies, ISAs, etc used as collateral for the mortgage

Provider & No.

Present value

Monthly

In whose name?

£

£

£

£

£

£