



White Rose Finance

Fast Competitive Finance Solutions

MORTGAGE - PROJECT FACT FIND

Please complete this fact find electronically if possible and email to: enquiries@whiterosefinance.com

This section for internal use.	
AFC / Professional Associate:	E-mail:
	Date:

1. Mortgage Form

What form of mortgage is being sought?

Residential

Buy to Let

Self-Build

Is the Mortgage for a Purchase?

Is the Mortgage for a Re-finance?

2. Applicant Details

	First Applicant		Second Applicant	
Title	M	F	M	F
Surname				
First Name(s)				
Previous Name(s)				
Nationality				
Date of Birth (dd/mm/yy)				
Marital Status				
Applicant Relationship				
Dependents	No.	Ages.	No.	Ages.
Current Address				
Postcode				
Telephone Number				
Mobile Number				
Residential Status	Owner With Parents	Tenant	Owner With Parents	Tenant
Date moved in to current address				
If at Current Address Less than Three Years Previous Address				
Anticipated Changes to Circumstances – If yes Please Specify				

Your home may be repossessed if you do not keep up repayments on your mortgage

White Rose Finance Group Ltd
Unit 11, Ousegate Business Centre
Ousegate
SELBY, YO8 4NN



Tel: 0845 838 1954 Fax: 01757 700963
e-mail enquiries@whiterosefinance.com Web: www.whiterosefinance.com
Consumer Credit Licence: 570063 Data Protection: Z 9035227



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3. Income Details				
	First Applicant		Second Applicant	
Occupation				
Employment Status	Employed	Self-Employed	Employed	Self-Employed
	Director % Shareholding		Director % Shareholding	
	Pensioner		Pensioner	
Salaried Employment Please complete the Following				
Is your job	Full-Time	Part-Time	Full-Time	Part-time
Employment Contract	Permanent	Temporary	Permanent	Temporary
Time in employment	Years		Years	
Employed Basic Income	£		£	
Guaranteed Additional (pa) -Overtime/Bonus etc.	£		£	
Regular Additional (pa) -Overtime/Bonus etc.	£		£	
Other Income (Please Specify)	£		£	
Employers Address				
Expected Retirement Age				
Self-Employed Please complete the Following				
Are Accounts Available	Yes	No	Yes	No
How many Years?				
Net Profit Last Year	£		£	
Previous Year	£		£	
The Year Before That	£		£	
Other Income (Please give amounts and details)				

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5. Current Residential Mortgage				
	First Applicant		Second Applicant	
Advised Value				
Current Lender				
Mortgage Outstanding				
Term Remaining	Years		Years	
Monthly Payment	£		£	
Capital Outstanding				
Repayment Method	Interest Only	Cap/Interest	Interest Only	Cap/Interest
Interest Rate Type	Variable	Capped	Variable	Capped
	Fixed	Discounted	Fixed	Discounted
	Flexible	Other	Flexible	Other

**Residential Mortgage Sections 6 & 7
Buy To Let Mortgage Section 8
Self – Build Mortgage Section 9**

6. Residential Mortgage Refinance on Existing Property		
Loan Required	£	
Preferred Repayment Method	Interest Only	Cap/Interest
Preferred Interest Rate Type	Variable	Capped
	Fixed	Discounted
	Flexible	Other
Plans for Refinance Monies		

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7. Residential Mortgage For Purchase Property				
Purchase Price	£			
Loan Required	£			
Preferred Repayment Method	Interest Only		Cap/Interest	
Preferred Interest Rate Type	Variable		Capped	
	Fixed		Discounted	
Address				
				Postcode
Property Type	House	Maisonette	Bungalow	Flat
	Secured	Other		
Construction Type			Age	
Tenure	Freehold		Leasehold	
If Leasehold Remaining Lease				Years
Completion Date				
Source of balance of funds				
Is there any builder's discount?	Yes		No	

8. Buy to Let Required				
Purchase Price	£			
Advised Value	£			
Existing Mortgage	£	Lender		
Loan Required	£			
Address				
				Postcode
Property Type	House	Maisonette	Holiday Let	HMO
	Bungalow	Flat	New Build	Other
Construction Type			Age	
Date Signed Off (If New)			Date Registered (If New)	
Tenure	Freehold		Leasehold	
If Leasehold Remaining Lease				Years
Is Property Lettable on Day 1	Yes		No	
Completion Date Required				
Source of balance of funds				
Is there a Builders Discount	Yes		No	
Is the Property Tenanted	Yes		No	
Advised Rental Yield				Per Month

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9. Self - Build Mortgage Required				
Description of Site in its current state				
Level of Client Contribution Available	£			
Land Advised Value	£			
Land Purchase Price	£			
Advised Build Costs	£			
Property Type on Completion	House	Maisonette	Barn Conversion	Timber Frame
	Bungalow	Other		
Advised Completed Value	£			
Loan Required	£			
Address				Postcode
Title Number				
Will Current Residence be Sold Before Loan is Required	Yes		No	
Do You Have a Builder Identified.	Yes		No	
Is This a Fixed Price Quote	Yes		No	

10. Declaration	
Do not sign this declaration unless you are entirely satisfied. If you have any questions or are not satisfied with any aspect, please ask for assistance before signing this document or any other mortgage form.	
I/We agree that this fact find is a true record of my/our circumstances. I/We accept that this fact find relates only to mortgages and is not a fact find for investment advice regulated under the Financial Services and Markets Act. I/We confirm that the personal and confidential information provided by me/us can be disclosed by the firm for the purpose of arranging a mortgage on my/our behalf and that I/We have read the completed fact find before signing below.	
First Applicant's Signature	Second Applicant's Signature
Date	Date

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