

## CONFIDENTIAL QUESTIONNAIRE

Mortgage account number

**This document is required to assist both yourself and the Society in assessing your ability to meet future mortgage repayments. The details will be treated by the Society in strictest confidence.**

1. Personal details		
Names in full	Age	
1		
2		
Address(es)		
1	2	
Telephone numbers:		
Mobile:		
Email address:		
Are you married or single	1	2
Please state ages of any children you have	1	2
How many persons are wholly or partially dependent upon you (including wife and children)?	1	2
Are you surety or guarantor for any person?	1 YES / NO	2 YES / NO
Do you currently own any other houses or shops and are these subject to a mortgage?	1 YES / NO	2 YES / NO
Please describe your occupation(s) fully		
1		
2		
Full name and address of Employer or your trading address		
1		
2		
How long have you been with your present Employer?	1                      years	2                      years
Have you ever been bankrupt, or had a Court Order against you in respect of a debt? (if YES please provide details below)		YES / NO
Company	Debt £	Debt satisfied ?
		YES / NO
		YES / NO
		YES / NO

## MONTHLY INCOME & EXPENDITURE STATEMENT

2. Income	£
<b>Applicant 1:</b> Basic Income (take home pay)	
Guaranteed Overtime	
Guaranteed Bonus	
Shift Allowance	
Pension	
Child Benefit	
Tax Credits	
Other income (state source)	
<b>Applicant 2:</b> Basic Income (take home pay)	
Guaranteed Overtime	
Guaranteed Bonus	
Shift Allowance	
Pension	
Child Benefit	
Tax Credits	
Other income (state source)	
<b>A. Total Income</b>	
3. Expenditure	£
Mortgage (LUBS)	
Other Loans/Commitments (please give details on sheet 3)	
Housekeeping (food etc.)	
Council Tax	
Electric	
Gas	
Water Rates	
Child Care Fees	
Maintenance	
Travelling Expenses/Car Tax/Insurance	
School & Work Costs	
Life/Medical Insurance	
Accident, Sickness and Unemployment	
Buildings/Contents Insurance	
TV Licence/Sky Subscription	
Telephone/Mobile costs	
Broadband/Internet	
Clothing	
Memberships (including childrens activities)	
Other Regular Expenditure	
<b>B. Total Living Costs</b>	
<b>A less B = C. Disposable Income</b>	

**More information concerning your commitments**

Commitment type	Company	Amount owing £	Monthly repayment £	Purpose
2nd Mortgage				
3rd Mortgage				
4th Mortgage				
Bank Loan 1				
Bank Loan 2				
Bank Loan 3				
Credit cards 1				
Credit cards 2				
Credit cards 3				
Credit cards 4				
HP				
Catalogue				
County Court Judgements				
Other credit 1				
Other credit 2				
Other credit 3				

Please use this space to make any notes regarding your commitments

**Please provide the following information so that we may understand your current personal circumstances / the reason for your request**

What are your present difficulties or why are you requesting a change to your account

Why have these arisen or what has changed

How long do you expect to be in this position

Proposals for payments and dates

Details of any known future changes to your income

I/We acknowledge that if a concession is agreed my/our details will be forwarded to the credit reference agencies.

Signed:

Date: