

MORTGAGE FACTFINDER FORM

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1. Personal Details – Borrower 1 Personal Details – Borrower 2

Title	Mr	Mrs	Miss	Ms	Dr	Other		Title	Mr	Mrs	Miss	Ms	Dr	Other		
Surname								Surname								
Other names (in full)								Other names (in full)								
Date of Birth				Country of Residence					Date of Birth				Country of Residence			
Nationality				Mobile Number					Nationality				Mobile Number			
Email								Email								
Number of Dependants				Ages					Number of Dependants				Ages			

2. Employment Details – Borrower 1 Employment Details – Borrower 2

Occupation								Occupation								
Employment Status		Employed		Self-employed		Retired			Employment Status		Employed		Self-employed		Retired	
Company Name								Company Name								
Years of Employment				Annual Income					Years of Employment				Annual Income			

3. Financial Information – (Aggregate amount for joint borrowers)

Total Savings				Annual Rental Income					Total Investment + Portfolio Value (EXCL Property)							
Monthly Expenditure <small>(i.e. Rent, School Fees etc)</small>				Other Monthly Expenditure					Existing UK Bank Account			Do you have a UK will?				
									Yes		No		Yes		No	

4. Existing Property Portfolio

No.1 Property Location	HK	UK	OTHER		No.2 Property Location	HK	UK	OTHER		
Estimated Market Value		Monthly Rental Income				Estimated Market Value		Monthly Rental Income		
Mortgage Bank		Estimated Mortgage Balance				Mortgage Bank		Estimated Mortgage Balance		
Monthly Mortgage Repayment					Monthly Mortgage Repayment					
Additional Information <small>(i.e. Remaining Term etc)</small>					Additional Information <small>(i.e. Remaining Term etc)</small>					

5. New Purchase / Remortgage Property

Purchase Price / Expected Market Value				Mortgage Amount Required			
Expected Rental Income				Expected Completion Date			
Property Address							
Other Information <small>(i.e. Property Type / no. of Bedrooms / Freehold or Leasehold etc)</small>							

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(Individual/Joint/Company)



6. Other Information (i.e. Additional Property / Bonus Details)

7. Data Protection

Your Partner and/or St. James's Place* are the data controllers of any personal data you provide to us on this form and any further information which you subsequently provide to us. Your Partner and St. James's Place* each have a legal obligation to comply with applicable data protection legislation. For further information on our uses of your personal data, and your rights in relation to your personal data, please see the Partner's Privacy Policy, which can be accessed on their website and/or the Privacy Policy of St. James's Place*, which can be accessed at **www.sjp.co.uk/privacy**. A paper copy of the privacy policy is available on request from your Partner.

Where you are providing us with personal data about other individuals, you will inform each of them that you are providing their information to us, refer them to the Partner's Privacy Policy, which can be accessed on their website and/or the Privacy Policy of St. James's Place*, which can be accessed at **www.sjp.co.uk/privacy**.

** St. James's Place is a wealth management group which includes St. James's Place plc and its subsidiaries. A list of subsidiaries is available within the Privacy Policy.*

UK Mortgages acts as an introducer for UK lending. We do not deal with property in Hong Kong. All information is retained strictly for the purpose of obtaining borrowing from a lender and otherwise remains private and confidential. All declarations made on this form may require you to produce documentary evidence. Your property is at risk if you do not keep up repayments on the loan.

SUBMIT