

Mortgage Pre-enquiry Form

Where did you hear about New Star Financial Management? _____

Name 1st applicant:

D.O.B 1st applicant:

Mobile Number:

Email Address:

Address of 1st applicant: _____

Length of time at above address: -

If less than 3 years please provide previous address: - _____

MARRIED - Y / N

Name 2nd applicant:

D.O.B. 2nd applicant:

Mobile Number:

Email Address:

Address of 2nd Applicant: _____

Length of time at above address:-

If less than 3 years please provide previous address: - _____

MARRIED – Y / N

Renting – Y / N

If Renting – how much per month - €

Is rent paid by Standing Order or Cash?

Number of children and ages:-

Childcare Costs:-

Where is Child Benefit paid?

EMPLOYMENT

Occupation (state full title) of **1st** Applicant: - _____

Name of Employer: -

Length of service:-

Permanent or Contract?

Full-time or Part-time?

Gross Basic Annual Income?

Amount deducted each week/fortnight/month for pension Contribution?

If **Self-employed** please complete the following:

YEAR	NET PROFIT	FORM 11	CHAPTER 4

Occupation (state full title) of **2nd** Applicant: - _____

Name of Employer:-

Length of service:-

Permanent or Contract?

Full-time or Part-time?

Gross Basic Annual Income?

Amount deducted each week/fortnight/month for pension Contribution?

If **Self-employed** please complete the following:

YEAR	NET PROFIT	FORM 11	CHAPTER 4

LOANS

1st Applicant

Amount O/S –

Remaining Term –

Current Repayment –

Provider –

Reason for loan –

2nd Applicant

Amount O/S –

Remaining Term –

Current Repayment –

Provider –

Reason for loan –

EXISTING MORTGAGE DETAILS

Original Amount Borrowed:

Amount O/standing now:

Term Remaining:

Rate:

Repayment:

Lender:

Apx Value of Property:

If to be rented – achievable rental income:

BUILD INFO DETAILS

Confirmation of Square footage:

Cost of Construction:

Does the costings include Contingency and if so – how much?

Cost of works to date that can be substantiated by receipts

Is anything owing on the site purchase:

Apx value of site:

Address of site:
 Fixed Price Contract or Direct Labour:
 When does FPP expire:
 Type/Style of house:
 No. of Bedrooms:
 Acreage of site:
 Apx value upon completion if known:
 Who is architect/engineer:

CREDIT CARD

1st Applicant –
 Credit Limit –
 Amount O/S –
 Amount Repaid each month/cleared in full?

2nd Applicant –
 Credit Limit –
 Amount O/S –
 Amount Repaid each month/cleared in full?

SAVINGS

Please list all details separately below for EACH savings account held:-

1st applicant -

Where savings are held?	Current amount saved?	Amount saved each month?

2nd applicant -

Where savings are held?	Current amount saved?	Amount saved each month?

TOTAL SAVINGS: _____

Have you a gift (sum of money) available from a parent or sibling? _____

FACT-FIND REVIEW

The purpose of this part of the questionnaire is to clarify your financial needs, and to assist us to advise you in relation to certain financial products, including life assurance and serious illness cover.

1st applicant

2nd applicant

Smoker

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Health/Family Health

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Existing Life Assurance Cover

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Existing Serious Illness or Income Insurance Cover

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Is price an important factor for you?

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Do you have a preference for a particular insurer?

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Do you require this product to be put in place immediately?

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Have you made a will?

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Direct Marketing

I confirm having read the paragraphs in relation to Data Protection in the Terms of Business and above, and consent to New Star Financial Management Ltd making contact with me by letter, phone, email, or SMS text in relation to the range of services provided by New Star Financial Management Ltd or its associated or partnership companies and to the sharing of relevant information as indicated.

If you do not wish to avail of these services, please tick here

1st Applicant Signature: _____

Date: _____

2nd Applicant Signature: _____

Date: _____

PLEASE POST OR EMAIL ALL COMPLETED PRE-ENQUIRY FORMS BACK TO:-
TARA WYLIE
New Star Financial Management Ltd
50 Mount Street
Mullingar
Co. Westmeath
E: tara@newstarfm.ie

New Star Financial Management Ltd is regulated by the Central Bank of Ireland.

WARNING: Your home is at risk if you do not keep up payments on a mortgage or another loan secured on it. Unit Values may fall as well as rise.