

SALE AND PURCHASE QUESTIONNAIRE

Dear Client

This questionnaire gives us the information required to commence dealing with your instructions. The information will assist us to deal with your matter as efficiently as possible.

If you are **buying** a property please complete sections 1 and 2.

If you are **selling** a property please complete sections 1 and 3.

If you are **buying and selling** a property please complete all 3 sections.

Sign and date the form where indicated before returning to us.

For marketing purposes would you please complete the following:-

How did you hear about Whitehead Monckton?

Yellow Pages

Advert

Recommendation
By whom?.....

Other
Please state.....

Section 1 – General

1. (a) The **FULL** first names and surname(s)
in which your existing property (if any)
is held.

(b) The **FULL** first names and surname(s)
in which the new property (if any) is to
be bought.

2. (a) Address for correspondence until
completion.

(b) Address for correspondence after
completion (for a sale only).

3. Telephone number(s) where you can
be contacted:

Home:
Business:
Mobile:

4. Date of birth of all parties.

5. National insurance number of all
parties
.....

6. If you have a sale and purchase, are
these transactions dependent upon
each other? YES/NO

7. (a) Have you made a Will?
It is important that this point is
considered carefully, both in regard
to the property holding implications
between spouses and secondly in
regard to Inheritance and capital
gains tax planning. YES/NO

(b) If not, would you like one of our
advisors to contact you regarding this? YES/NO

8. Whitehead Monckton has its own in-
house independent financial advice
department, which is not tied to
banks, building societies or investment
houses. As part of our service, from
the details provided, we may send you
information on various products that
we consider may be of interest to you.

If you do not wish to receive this quotation, please tick the box.

Are you a smoker or non-smoker?

.....

If you are looking to invest proceeds from your transaction, our own in-house Independent Financial Adviser offers a free of charge initial consultation and will write to you to introduce himself. Please tick the box if you do **not** wish to be contacted.

Please enclose a cheque for £200.00 made payable to Whitehead Monckton in respect of the initial expenses up to exchange of contracts. All monies paid and not used on your behalf will be credited to your account.

- (a) I/we authorise Whitehead Monckton to act in this transaction.
- (b) Other solicitors have not been instructed.
- (c) The replies set out in this questionnaire are correct.
- (d) I/we authorise Whitehead Monckton to give third parties any information requested in connection with the transaction.

Signed.....

Signed.....

Dated.....

Section 2 – Purchases

- 1.(a) The **FULL** address of the property to be purchased.
.....
.....
- (b) The Vendor(s) name.
- (c) The Estate Agent and/or Solicitors acting for the Vendor.
.....
- 2. Is there a garage or a parking space in a separate block?
- 3. What is the purchase price? £.....
- 4. Please indicate whether the property is Freehold or Leasehold.
- 5. Have you paid a preliminary deposit – if so how much and to whom?
- 6. Are you obtaining a mortgage? If so:-
 - (a) Name and address of Lender.
.....
 - (b) Name and address of Broker (if any).
.....
 - (c) The amount of mortgage you have applied for. £.....
 - (d) Is the mortgage a repayment or endowment mortgage?
 - (e) What is the term of the mortgage?

PLEASE NOTE IF YOUR PURCHASE IS IN JOINT NAMES THE MORTGAGE MUST ALSO BE IN JOINT NAMES

If the mortgage money you need in total is being provided from more than one source you **must** give us full details so that we can protect your interests.

7. Please state the names and ages of anyone over the age of seventeen who will occupy the premises with you.
.....

8.(a) Can you pay 10% of the purchase price as a deposit on exchange of contracts? (excluding any monies from a related sale) YES/NO

(b) If not, what can you provide from your own resources? £.....

Section 3 – Sales

1.(a) The **FULL** address of the property to be sold including postcode.
.....
.....

(b) The name of the Purchaser(s).

2. What is the sale price agreed? £.....

3. The name and address of the Estate Agents **OR** the name and address of the Purchaser's Solicitors.
.....

4. If the property is not in mortgage please let us have the title deeds as soon as possible.

5. If there is a mortgage on the property please supply:-

(a) Name of Building Society/Lender.

(b) Address.
.....

(c) Account/Roll No. (this is most important).

(d) Approximate amount outstanding on your present mortgage. £.....

6. If there is money due to any other organisation e.g. for home improvements, please supply:-

(a) Name of Lender.

(b) Address.
.....

(c) Account/Roll No.

(d) Approximate amount outstanding. £.....

PLEASE NOTE ALL LOANS ON THE PROPERTY MUST BE REPAID ON COMPLETION

7. Please indicate whether the property is Freehold or Leasehold.

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8. If you have married since you purchased the property, please let us borrow your marriage certificate.