

Transfer of Equity Questionnaire



Please complete all the sections of this questionnaire. We will then be able to start dealing with your property transaction. **Most importantly, please ensure the form is signed and dated where indicated on page 2 before returning the form to us.**

Section 1- General

Applicant 1

FULL name, (first and surname) _____

Date of birth _____ National Ins Number _____

Contact details: Home Tel. _____ Work Tel _____

Mobile _____ Email _____

Applicant 2

FULL names, (first and surname) _____

Date of birth _____ National Ins Number _____

Contact details: Home Tel _____ Work Tel _____

Mobile _____ Email _____

If you have a sale and purchase, are these transactions dependent upon each other?

YES/NO

Please enclose a cheque for £250.00 made payable to Whitehead Monckton to cover initial expenses.

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.

Finally, can we ask what prompted you to contact Whitehead Monckton?

Recommendation _____ If so, by whom? _____

Website _____ Advert _____ Other _____

Signed _____ Signed _____

Canterbury Office 01227 643250

Maidstone Office 01622 698000

Tenterden Office 01580 765722

www.whitehead-monckton.co.uk

Transfer of Equity Questionnaire

Dated _____

Section 2

1 If the property is not mortgaged please let us have the title deeds as soon as possible.

2 Existing mortgage details:

(a) Name of Building Society/Lender: _____

(b) Address: _____

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

(d) Approximate mortgage amount outstanding: £ _____

3 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 £ _____

4 Estimated value of the property: £ _____

5 Is the property Freehold or Leasehold? _____

6 What amount is to be paid to present co-owner for his/her share in the property:

£ _____

7 If obtaining a further advance from your present Lender, how much have you applied for:

£ _____

8 Have you approached your present Lender to obtain consent to the Transfer **YES/NO**

If so has consent been given **YES/NO**

9 Are you obtaining a new mortgage **YES/NO**. If so please supply:-

(a) Name and address of Lender: _____

(b) Name and address of Broker (if any): _____

(c) Amount of mortgage you have applied for: £ _____

(d) Is the mortgage a repayment or an endowment mortgage: _____

10 Who will be responsible for the costs of the Transfer? _____

11 Please state the name and address of the Solicitors (if any) acting for the co-owner: _____

12 Please state the names and ages of anyone over the age of 17, other than the owners, who will occupy the property with you: _____

13 If the property is Leasehold, please supply:-

(a) The name and address of the Landlord: _____

(b) The name and address of the Managing Agents (if any): _____

(c) The last ground rent receipt.

Please note that Stamp Duty may be payable on a transfer of equity