

Fact Find Form

Completing this document places you under no obligation to use our services but will enable us to make an initial assessment of your needs and options open to you. We will only make a recommendation after a full appraisal, discussion and explanation of your current situation and the options available to you.

1. Although this document has a number of pages it has been designed to be easy to complete - once completed the information can be used to form the basis of a full appraisal
2. All the information provided is held in confidence and used for the purpose of sourcing finance for you. Please refer to our privacy statement for further information.
3. If you run out of space please use the additional notes section at the back of this document.

Section 1: Details of Loan

Type of loan:	Purchase <input type="checkbox"/>	Re-mortgage <input type="checkbox"/>	Second Mortgage <input type="checkbox"/>
Type of security:	Residential property (That you or a family member will occupy over 40%) <input type="checkbox"/>	Buy to let/HMO <input type="checkbox"/>	Land/development site <input type="checkbox"/>
	Semi Commercial Property <input type="checkbox"/>	Residential refurbishment <input type="checkbox"/>	Commercial property for investment <input type="checkbox"/>
	Commercial property for own business to trade from <input type="checkbox"/>		

Finance required

Term loan :	<input type="text"/>	Bridging loan: (i.e. 1-24 months)	<input type="text"/>
Development finance:	<input type="text"/>		

Entity Applying for Finance

Personal name:	<input type="text"/>	Limited company/partnership	Yes <input type="checkbox"/>	No <input type="checkbox"/>
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If yes to Limited company/partnership please provide

Company name:	<input type="text"/>	Company number:	<input type="text"/>
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SSAS/SIPP:	Yes <input type="checkbox"/>	No <input type="checkbox"/>	If yes please provide name:	<input type="text"/>
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Trust:	Yes <input type="checkbox"/>	No <input type="checkbox"/>	If yes please provide name:	<input type="text"/>
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Loan amount required:	£ <input type="text"/>	Loan term required:	<input type="text"/>
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Purpose of loan/
summary of requirements:

Do you currently own any other property in addition to the one on you application?

Yes No

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Section 2: Applicant Details

	1st Applicant		2nd Applicant
Title:	<input type="text"/>	Title:	<input type="text"/>
First name:	<input type="text"/>	First name:	<input type="text"/>
Middle name:	<input type="text"/>	Middle name:	<input type="text"/>
Surname:	<input type="text"/>	Surname:	<input type="text"/>
Previous name:	<input type="text"/>	Previous name:	<input type="text"/>
Date of name change:	<input type="text"/> / <input type="text"/> / <input type="text"/>	Date of name change:	<input type="text"/> / <input type="text"/> / <input type="text"/>
Date of birth:	<input type="text"/> / <input type="text"/> / <input type="text"/>	Date of birth:	<input type="text"/> / <input type="text"/> / <input type="text"/>
Marital status:	Single: <input type="checkbox"/> Married: <input type="checkbox"/> Divorced: <input type="checkbox"/> Living Together: <input type="checkbox"/> Separated: <input type="checkbox"/> Widowed: <input type="checkbox"/>	Marital status:	Single: <input type="checkbox"/> Married: <input type="checkbox"/> Divorced: <input type="checkbox"/> Living Together: <input type="checkbox"/> Separated: <input type="checkbox"/> Widowed: <input type="checkbox"/>
Nationality:	<input type="text"/>	Nationality:	<input type="text"/>
Country of residence:	<input type="text"/>	Country of residence:	<input type="text"/>
Indefinite rights to reside in the UK?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Indefinite rights to reside in the UK?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If in UK on a VISA please provide the details of the type of VISA and expiry date	<input type="text"/>	If in UK on a VISA please provide the details of the type of VISA and expiry date	<input type="text"/>
NI number:	<input type="text"/>	NI number:	<input type="text"/>
Planned retirement age:	<input type="text"/>	Planned retirement age:	<input type="text"/>
Current Address:	<input type="text"/>	Current Address:	<input type="text"/>
Postcode:	<input type="text"/>	Postcode:	<input type="text"/>
Date moved in:	<input type="text"/> / <input type="text"/> / <input type="text"/>	Date moved in:	<input type="text"/> / <input type="text"/> / <input type="text"/>
Residential status:	Homeowner <input type="checkbox"/> Tenant <input type="checkbox"/> Living with relatives <input type="checkbox"/>	Residential status:	Homeowner <input type="checkbox"/> Tenant <input type="checkbox"/> Living with relatives <input type="checkbox"/>
Name of landlord (If currently renting)	<input type="text"/>	Name of landlord (If currently renting)	<input type="text"/>
Previous address: (If less than 3 at current)	<input type="text"/>	Previous address: (If less than 3 at current)	<input type="text"/>
Postcode:	<input type="text"/>	Postcode:	<input type="text"/>

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<p>1st Applicant</p> <p>Date moved in: <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/></p> <p>Home telephone no: <input style="width: 200px; height: 20px; border: 1px solid #ccc;" type="text"/></p> <p>Mobile no: <input style="width: 200px; height: 20px; border: 1px solid #ccc;" type="text"/></p> <p>Work no: <input style="width: 200px; height: 20px; border: 1px solid #ccc;" type="text"/></p> <p>Email address: <input style="width: 200px; height: 20px; border: 1px solid #ccc;" type="text"/></p> <p>Preferred contact method: <input style="width: 200px; height: 20px; border: 1px solid #ccc;" type="text"/></p>	<p>2nd Applicant</p> <p>Date moved in: <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/></p> <p>Home telephone no: <input style="width: 200px; height: 20px; border: 1px solid #ccc;" type="text"/></p> <p>Mobile no: <input style="width: 200px; height: 20px; border: 1px solid #ccc;" type="text"/></p> <p>Work no: <input style="width: 200px; height: 20px; border: 1px solid #ccc;" type="text"/></p> <p>Email address: <input style="width: 200px; height: 20px; border: 1px solid #ccc;" type="text"/></p> <p>Preferred contact method: <input style="width: 200px; height: 20px; border: 1px solid #ccc;" type="text"/></p>
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Children and other Dependents (if any others, please add to additional details page)

Applicant 1

Name	DOB	Relation to applicant	In full time education	Privately educated?	If privately educated when does that end?
<input style="width: 150px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 150px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 80px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 80px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/>
<input style="width: 150px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 150px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 80px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 80px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/>
<input style="width: 150px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 150px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 80px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 80px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/>

Any other persons over 17 living at the property with you? If yes please provide details:

Name	DOB	Relation to applicant
<input style="width: 250px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 380px; height: 20px; border: 1px solid #ccc;" type="text"/>
<input style="width: 250px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 380px; height: 20px; border: 1px solid #ccc;" type="text"/>
<input style="width: 250px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 380px; height: 20px; border: 1px solid #ccc;" type="text"/>

Applicant 2 (If different to applicant 1)

Name	DOB	Relation to applicant	In full time education	Privately educated?	If privately educated when does that end?
<input style="width: 150px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 150px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 80px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 80px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/>
<input style="width: 150px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 150px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 80px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 80px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/>
<input style="width: 150px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 150px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 80px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 80px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 30px; height: 20px; border: 1px solid #ccc;" type="text"/>

Any other persons over 17 living at the property with you? If yes please provide details:

Name	DOB	Relation to applicant
<input style="width: 250px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 380px; height: 20px; border: 1px solid #ccc;" type="text"/>
<input style="width: 250px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 380px; height: 20px; border: 1px solid #ccc;" type="text"/>
<input style="width: 250px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/> / <input style="width: 40px; height: 20px; border: 1px solid #ccc;" type="text"/>	<input style="width: 380px; height: 20px; border: 1px solid #ccc;" type="text"/>

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Section 3: Employment & Self Employment

3.a Employed – (if self employed please go to section 3b)

1st Applicant

Job title:

Date employment started: / /

(If you have been at your current job for less than 3 years, please provide full employment history on the additional notes page.)

Employment type: Full time Part time
 Zero hours contract Student
 Unemployed

Employer name:

Employer address:

Currently in probation period:

End date (if applicable): / /

Employee number:

Tax code:

Basic annual income: £

Regular overtime/bonus: £

Car/travel allowance: £

Other income from employer: £

Monthly net income: £

2nd Applicant

Job title:

Date employment started: / /

(If you have been at your current job for less than 3 years, please provide full employment history on the additional notes page.)

Employment type: Full time Part time
 Zero hours contract Student
 Unemployed

Employer name:

Employer address:

Currently in probation period:

End date (if applicable): / /

Employee number:

Tax code:

Basic annual income: £

Regular overtime/bonus: £

Car/travel allowance: £

Other income from employer: £

Monthly net income: £

3.b Self employed

Business type: Sole trader Partnership
 Ltd Company

Business name:

Nature of business:

Business type: Sole trader Partnership
 Ltd Company

Business name:

Nature of business:

3.c Income from other sources

Private pension (per annum):

State pension (per annum):

Investments/trust income:

Benefits/tax credits:

Any other income (Please specify type):

Private pension (per annum):

State pension (per annum):

Investments/trust income:

Benefits/tax credits:

Any other income (Please specify type):

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	1st Applicant		2nd Applicant
Job role within business:	<input style="width: 100%;" type="text"/>	Job role within business:	<input style="width: 100%;" type="text"/>
Percentage of the company you own:	<input style="width: 100%;" type="text"/>	Percentage of the company you own:	<input style="width: 100%;" type="text"/>
Company registration no.	<input style="width: 100%;" type="text"/>	Company registration no.	<input style="width: 100%;" type="text"/>
Start date of business	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>	Start date of business	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>
Trading address of business	<input style="width: 100%; height: 40px;" type="text"/>	Trading address of business	<input style="width: 100%; height: 40px;" type="text"/>
Telephone number	<input style="width: 100%;" type="text"/>	Telephone number	<input style="width: 100%;" type="text"/>
Provide last 3 years of:		Provide last 3 years of:	
Tax year end:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>	Tax year end:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>
Turnover:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>	Turnover:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>
Gross profit:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>	Gross profit:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>
Net profit:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>	Net profit:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>
Please provide an explanation for any significant increase/decrease in net profit:	<input style="width: 100%; height: 60px;" type="text"/>	Please provide an explanation for any significant increase/decrease in net profit:	<input style="width: 100%; height: 60px;" type="text"/>
If limited company director, please confirm the following:		If limited company director, please confirm the following:	
Please provide last 3 years PAYE salary:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>	Please provide last 3 years PAYE salary:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>
	£ <input style="width: 25%;" type="text"/> / £ <input style="width: 25%;" type="text"/> / £ <input style="width: 25%;" type="text"/>		£ <input style="width: 25%;" type="text"/> / £ <input style="width: 25%;" type="text"/> / £ <input style="width: 25%;" type="text"/>
Please provide last 3 years dividends:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>	Please provide last 3 years dividends:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>
	£ <input style="width: 25%;" type="text"/> / £ <input style="width: 25%;" type="text"/> / £ <input style="width: 25%;" type="text"/>		£ <input style="width: 25%;" type="text"/> / £ <input style="width: 25%;" type="text"/> / £ <input style="width: 25%;" type="text"/>
Any income derived from repayment of director's loan? <small>If so, please confirm outstanding balance and how much is paid each year.</small>	<input style="width: 100%;" type="text"/>	Any income derived from repayment of director's loan? <small>If so, please confirm outstanding balance and how much is paid each year.</small>	<input style="width: 100%;" type="text"/>
Outstanding balance	<input style="width: 100%;" type="text"/>	Outstanding balance	<input style="width: 100%;" type="text"/>
Paid per annum	<input style="width: 100%;" type="text"/>	Paid per annum	<input style="width: 100%;" type="text"/>
Accountant details:		Accountant details:	
Contact name:	<input style="width: 100%;" type="text"/>	Contact name:	<input style="width: 100%;" type="text"/>
Company name:	<input style="width: 100%;" type="text"/>	Company name:	<input style="width: 100%;" type="text"/>
Address:	<input style="width: 100%; height: 40px;" type="text"/>	Address:	<input style="width: 100%; height: 40px;" type="text"/>
Telephone number:	<input style="width: 100%;" type="text"/>	Telephone number:	<input style="width: 100%;" type="text"/>
Email address:	<input style="width: 100%;" type="text"/>	Email address:	<input style="width: 100%;" type="text"/>
Qualifications:	<input style="width: 100%; height: 40px;" type="text"/>	Qualifications:	<input style="width: 100%; height: 40px;" type="text"/>
How long have they acted for you?	<input style="width: 100%;" type="text"/>	How long have they acted for you?	<input style="width: 100%;" type="text"/>

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Section 4: Budget Planner

		Applicant 1	Applicant 2
Net income	Monthly salary: (average take home pay)	£ <input type="text"/>	£ <input type="text"/>
	Benefits/tax credits:	£ <input type="text"/>	£ <input type="text"/>
	Investment/other income:	£ <input type="text"/>	£ <input type="text"/>
	Total net income:	£ <input type="text"/>	£ <input type="text"/>
Essential Household Expenses	Mortgage/rent:	£ <input type="text"/>	£ <input type="text"/>
	All insurances:	£ <input type="text"/>	£ <input type="text"/>
	Electric/gas/fuel:	£ <input type="text"/>	£ <input type="text"/>
	Water:	£ <input type="text"/>	£ <input type="text"/>
	Council tax:	£ <input type="text"/>	£ <input type="text"/>
	Ground rent/service charge:	£ <input type="text"/>	£ <input type="text"/>
	TV licence/internet/subscriptions:	£ <input type="text"/>	£ <input type="text"/>
	Telephone (landline & mobile)	£ <input type="text"/>	£ <input type="text"/>
	Food & living:	£ <input type="text"/>	£ <input type="text"/>
Car & Travel	Petrol, maintenance, servicing and tax:	£ <input type="text"/>	£ <input type="text"/>
	Public transport:	£ <input type="text"/>	£ <input type="text"/>
Other Regular Outgoings	Loans/credit cards/Store cards/HP:	£ <input type="text"/>	£ <input type="text"/>
	Life assurance/endowments:	£ <input type="text"/>	£ <input type="text"/>
	Pension plan: (if not deducted from salary)	£ <input type="text"/>	£ <input type="text"/>
	Payments to savings account:	£ <input type="text"/>	£ <input type="text"/>
	Clothing/hair:	£ <input type="text"/>	£ <input type="text"/>
	Health bills/dentist/private cover:	£ <input type="text"/>	£ <input type="text"/>
	Childcare/private school fees:	£ <input type="text"/>	£ <input type="text"/>
	Entertaining/memberships:	£ <input type="text"/>	£ <input type="text"/>
	Holidays:	£ <input type="text"/>	£ <input type="text"/>
	Alimony/child maintenance:	£ <input type="text"/>	£ <input type="text"/>
	Additional dependants expenses:	£ <input type="text"/>	£ <input type="text"/>
	Misc:	£ <input type="text"/>	£ <input type="text"/>
	Total expenditure:	£ <input type="text"/>	£ <input type="text"/>
Total surplus income:	£ <input type="text"/>	£ <input type="text"/>	

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Do you have any reason to expect an increase or decrease in your monthly expenditure in the foreseeable future, if yes, please detail which expenses and the reason why below.

Section 5: Existing Residential Mortgage Details

	1st Applicant		2nd Applicant
Current lender:	<input style="width: 95%;" type="text"/>	Current lender:	<input style="width: 95%;" type="text"/>
Current balance:	<input style="width: 95%;" type="text"/>	Current balance:	<input style="width: 95%;" type="text"/>
Monthly payment:	<input style="width: 95%;" type="text"/>	Monthly payment:	<input style="width: 95%;" type="text"/>
Interest rate:	<input style="width: 95%;" type="text"/>	Interest rate:	<input style="width: 95%;" type="text"/>
Interest rate type <small>(fixed / variable) & end date</small>	<input style="width: 95%;" type="text"/>	Interest rate type <small>(fixed / variable) & end date</small>	<input style="width: 95%;" type="text"/>
Repayment type:	<input style="width: 95%;" type="text"/>	Repayment type:	<input style="width: 95%;" type="text"/>
Start date:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>	Start date:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>
Term of loan remaining:	<input style="width: 95%;" type="text"/>	Term of loan remaining:	<input style="width: 95%;" type="text"/>
Early redemption penalties	<input style="width: 95%;" type="text"/>	Early redemption penalties	<input style="width: 95%;" type="text"/>
End date of early redemption penalties	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>	End date of early redemption penalties	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>
Account number:	<input style="width: 95%;" type="text"/>	Account number:	<input style="width: 95%;" type="text"/>
Original amount borrowed: £	<input style="width: 95%;" type="text"/>	Original amount borrowed: £	<input style="width: 95%;" type="text"/>
Original purchase date:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>	Original purchase date:	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>
Are there any further charges on the property? <small>If so please provide details below:</small>	<input type="checkbox"/>	Are there any further charges on the property? <small>If so please provide details below:</small>	<input type="checkbox"/>
Current lender:	<input style="width: 95%;" type="text"/>	Current lender:	<input style="width: 95%;" type="text"/>
Current balance:	<input style="width: 95%;" type="text"/>	Current balance:	<input style="width: 95%;" type="text"/>
Monthly payment	<input style="width: 95%;" type="text"/>	Monthly payment	<input style="width: 95%;" type="text"/>
Interest rate	<input style="width: 95%;" type="text"/>	Interest rate	<input style="width: 95%;" type="text"/>
Interest rate type <small>(fixed / variable) & end date</small>	<input style="width: 95%;" type="text"/>	Interest rate type <small>(fixed / variable) & end date</small>	<input style="width: 95%;" type="text"/>
Repayment type	<input style="width: 95%;" type="text"/>	Repayment type	<input style="width: 95%;" type="text"/>
Start date	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>	Start date	<input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/> / <input style="width: 25%;" type="text"/>
Term of loan	<input style="width: 95%;" type="text"/>	Term of loan	<input style="width: 95%;" type="text"/>
Early redemption penalties	<input style="width: 95%;" type="text"/>	Early redemption penalties	<input style="width: 95%;" type="text"/>

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<p>End date of early redemption penalties <input type="text"/> / <input type="text"/> / <input type="text"/></p> <p>Account number: <input style="width: 100%;" type="text"/></p> <p>What was this funding used for? <input style="width: 100%;" type="text"/></p> <p>Is this being redeemed? Yes <input type="checkbox"/> No <input type="checkbox"/></p>	<p>End date of early redemption penalties <input type="text"/> / <input type="text"/> / <input type="text"/></p> <p>Account number: <input style="width: 100%;" type="text"/></p> <p>What was this funding used for? <input style="width: 100%;" type="text"/></p> <p>Is this being redeemed? Yes <input type="checkbox"/> No <input type="checkbox"/></p>
--	--

For any other properties that you own, please complete the property portfolio in **Section 11**

Section 6: Credit History

		1st Applicant					2nd Applicant		
Mortgage arrears	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Mortgage arrears	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Defaults Registered against you	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Defaults Registered against you	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
County Court Judgement	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	County Court Judgement	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Have you ever been declared bankrupt?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Have you ever been declared bankrupt?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Have you ever entered into an IVA?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Have you ever entered into an IVA?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Have you ever entered into a debt management plan?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Have you ever entered into a debt management plan?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Missed payments on any unsecured credit?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Missed payments on any unsecured credit?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Ever had a property repossessed?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Ever had a property repossessed?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Ever taken out any pay day loans?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Ever taken out any pay day loans?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
Ever been involved in a company that has gone into liquidation?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Ever been involved in a company that has gone into liquidation?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>

If yes to any of the above please provide in details on **page 13**

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Section 7: Current Credit Commitments

Do you have any reason to expect an increase or decrease in your monthly expenditure in the foreseeable future, if yes, please detail which expenses and the reason why below.

App 1/App 2/Joint	Type (credit card/loan/default etc)	Provider name	Amount owed	Credit limit if applicable	Monthly payment	Account number	To be cleared
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	£ <input type="text"/>	<input type="text"/>	<input type="checkbox"/>

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Section 8: Current Account Details

	1st Applicant		2nd Applicant
Account name:	<input type="text"/>	Account name:	<input type="text"/>
Bank name:	<input type="text"/>	Bank name:	<input type="text"/>
Account number:	<input type="text"/>	Account number:	<input type="text"/>
Sort code:	<input type="text"/>	Sort code:	<input type="text"/>
Years with bank:	<input type="text"/>	Years with bank:	<input type="text"/>
Branch:	<input type="text"/>	Branch:	<input type="text"/>

Section 9: Assets

Please include details of any non-property assets you have including cash resources, stocks and shares value and other personal assets. This should also include source of your deposit if applicable so we know where this is coming from.

Owner of asset	Asset Type <small>eg. Savings, pension, cars</small>	Value of asset	To be Used towards Deposit?		
			Yes	No	
<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	£ <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section 10: Security Details

Address:

Value: Purchase price:

Original purchase price: Original purchase date: / /

(If refinancing)

Year built: Explanation for any increase in value since purchased:

(Approx, if known)

Property type:

Property tenure: Freehold Feuhold Leasehold

If Leasehold, please confirm: Lease term remaining Do you own any share of the freehold?

Ground rent (Please confirm percentage either personally or in another entity?)

Service charge

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Details of any known restrictions and covenants to the property

Is the property standard construction? Yes No Any history of flooding? Yes No
 Is it a listed building? Yes No Is the property ready to let? (Finished condition) Yes No

Do you own any adjoining properties or properties within the same block?
If so please provide details

Do you plan to make any changes to the property
(If so please provide details of what you intend to do, the cost of the works, how long will the work take, will this increase the value, is planning permission required and is it currently in place)

Applicable if Residential Property (for you to live in or for investment/BTL)

If flat: how many stories What floor is the flat on?
 Is there a lift? Yes No Confirm the sq ft area (If studio flat)
 Ex Local Authority Yes No No of bedrooms
 No of reception rooms No of kitchens
 No of bathrooms Private parking Yes No
 Garage Yes No Is there an annexe? Yes No
 Acreage Help to buy / right to buy scheme? (When purchasing)

Applicable if property to be used as a BTL/HMO

Number of tenants Number of ASTs Monthly Rental Income expected/achieved
 If the property will be let to multiple tenants do you have an HMO Licence (If required) Will it be let to Local Authority Housing Association
 Will any relatives occupy the 40% or more of the Housing Association property? If the property is a block of flats, please confirm the number of units and whether they are all on one freehold title currently
 Have you ever lived in the property? Yes No
 If yes (Please provide dates)
 Did you inherit the property? Yes No Do you manage the property yourself? (If no please provide the following) Yes No
 Name of managing agent Fees charged

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Applicable if Commercial/Semi Commercial Property

Current property use	<input type="text"/>	Name of current tenant <small>If multiple tenants, please provide info on additional details page.</small>	<input type="text"/>
Tenancy start date	<input type="text"/> / <input type="text"/> / <input type="text"/>	Tenancy expiry date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Details of any break clauses	<input type="text"/>	Frequency rent is paid <small>(i.e. monthly / quarterly)</small>	<input type="text"/>
Rent paid	<input type="text"/>	Do you manage the property yourself?	Yes <input type="checkbox"/> No <input type="checkbox"/>
		Date of next rent review	<input type="text"/> / <input type="text"/> / <input type="text"/>

If no to managing the property yourself please provide the following;

Name of management Agent	<input type="text"/>	Fees charged	<input type="text"/>
--------------------------	----------------------	--------------	----------------------

If the loan required if on a development site, please provide us with a full development appraisal and costings along with a personal CV detailing experience, architects plans and drawings, copy of planning permission and details of contractors.

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Section 11: Property Portfolio

If all of the below information is contained on your own existing spreadsheet, you can send this to us instead of completing this page.

Address	Value	Property type	Tenancy type	Tenancy length	Monthly rent	Mortgage payment	Fix or cap end date
	£	Residential	<input type="checkbox"/> Lease	<input type="checkbox"/>	£		
	Date purchased	Commercial	<input type="checkbox"/> License	<input type="checkbox"/> Tenancy details	Mortgage provider	Currently interest rate	Early redemption penalties
Purchase price		HMO	<input type="checkbox"/> AST	<input type="checkbox"/>	£		
	£				Mortgage balance	Interest rate type	

Address	Value	Property type	Tenancy type	Tenancy length	Monthly rent	Mortgage payment	Fix or cap end date
	£	Residential	<input type="checkbox"/> Lease	<input type="checkbox"/>	£		
	Date purchased	Commercial	<input type="checkbox"/> License	<input type="checkbox"/> Tenancy details	Mortgage provider	Currently interest rate	Early redemption penalties
Purchase price		HMO	<input type="checkbox"/> AST	<input type="checkbox"/>	£		
	£				Mortgage balance	Interest rate type	

Address	Value	Property type	Tenancy type	Tenancy length	Monthly rent	Mortgage payment	Fix or cap end date
	£	Residential	<input type="checkbox"/> Lease	<input type="checkbox"/>	£		
	Date purchased	Commercial	<input type="checkbox"/> License	<input type="checkbox"/> Tenancy details	Mortgage provider	Currently interest rate	Early redemption penalties
Purchase price		HMO	<input type="checkbox"/> AST	<input type="checkbox"/>	£		
	£				Mortgage balance	Interest rate type	

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Property Portfolio continued

Address	Value	Property type	Tenancy type	Tenancy length	Monthly rent	Mortgage payment	Fix or cap end date
	£	Residential	<input type="checkbox"/> Lease	<input type="checkbox"/>	£		
	Date purchased	Commercial	<input type="checkbox"/> License	<input type="checkbox"/> Tenancy details	Mortgage provider	Currently interest rate	Early redemption penalties
	Purchase price	HMO	<input type="checkbox"/> AST	<input type="checkbox"/>	£		
	£				£		

Address	Value	Property type	Tenancy type	Tenancy length	Monthly rent	Mortgage payment	Fix or cap end date
	£	Residential	<input type="checkbox"/> Lease	<input type="checkbox"/>	£		
	Date purchased	Commercial	<input type="checkbox"/> License	<input type="checkbox"/> Tenancy details	Mortgage provider	Currently interest rate	Early redemption penalties
	Purchase price	HMO	<input type="checkbox"/> AST	<input type="checkbox"/>	£		
	£				£		

Address	Value	Property type	Tenancy type	Tenancy length	Monthly rent	Mortgage payment	Fix or cap end date
	£	Residential	<input type="checkbox"/> Lease	<input type="checkbox"/>	£		
	Date purchased	Commercial	<input type="checkbox"/> License	<input type="checkbox"/> Tenancy details	Mortgage provider	Currently interest rate	Early redemption penalties
	Purchase price	HMO	<input type="checkbox"/> AST	<input type="checkbox"/>	£		
	£				£		

Total number of properties owned: Total mortgages outstanding: Total monthly rent: £ Total value: £

(If more than 6 properties please provide extra sheet or full details in spreadsheet format)

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Section 12: Solicitors and Estate Agents Details

Solicitors name	<input type="text"/>	Firm:	<input type="text"/>
Email address	<input type="text"/>	Contact Number	<input type="text"/>
Address	<input type="text"/>		
Estate Agents name (if purchasing)	<input type="text"/>	Firm:	<input type="text"/>
Email address	<input type="text"/>	Contact Number	<input type="text"/>

Section 13: Information about you

Please select your attitude towards risk; do you want the certainty of the mortgage being repaid at the end of the loan term?

Cautious Balanced Adventurous

- Cautious** Ensuring the mortgage balance is repaid at the end of the term is important to you
- Balanced** Part Capital repayment part interest only could be suitable for you if available. The part of the loan that is interest only will have to be repaid at the end of the term. You are prepared to take some risks.
- Adventurous** Interest only would suit your risk profile. You understand that at the end of the mortgage term, the balance will still be outstanding and you will need to consider a repayment strategy.

Is your income expected to increase or decrease in the foreseeable future? Increase Decrease

Are you planning to repay some/all of the mortgage in the foreseeable future? Yes No

Are you planning to move home in the foreseeable future? Yes No

If you have answered any of the above, please provide details

Which of the following are of most importance to you? Please rank with **1** being of most importance and **6** being a factor that you do not consider of importance to you.

An upper limit for the mortgage costs for a specific period?	<input type="checkbox"/>	Ability to offset savings or current account interest the against mortgage?	<input type="checkbox"/>
To fix mortgage costs for a certain period, if yes for how long?	<input type="checkbox"/>	No early repayment charges on:	Full repayment <input type="checkbox"/> Part repayment <input type="checkbox"/>
Lowest Initial Monthly Payments, if yes for how long?	<input type="checkbox"/>	If product allows you to add fees do you wish to?	Yes <input type="checkbox"/> No <input type="checkbox"/>

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How would you afford the mortgage payments if rates were to increase significantly?

How do you plan to afford the mortgage payments if the loan term extends into retirement?

How would you plan to repay the mortgage if an interest only repayment type is selected?

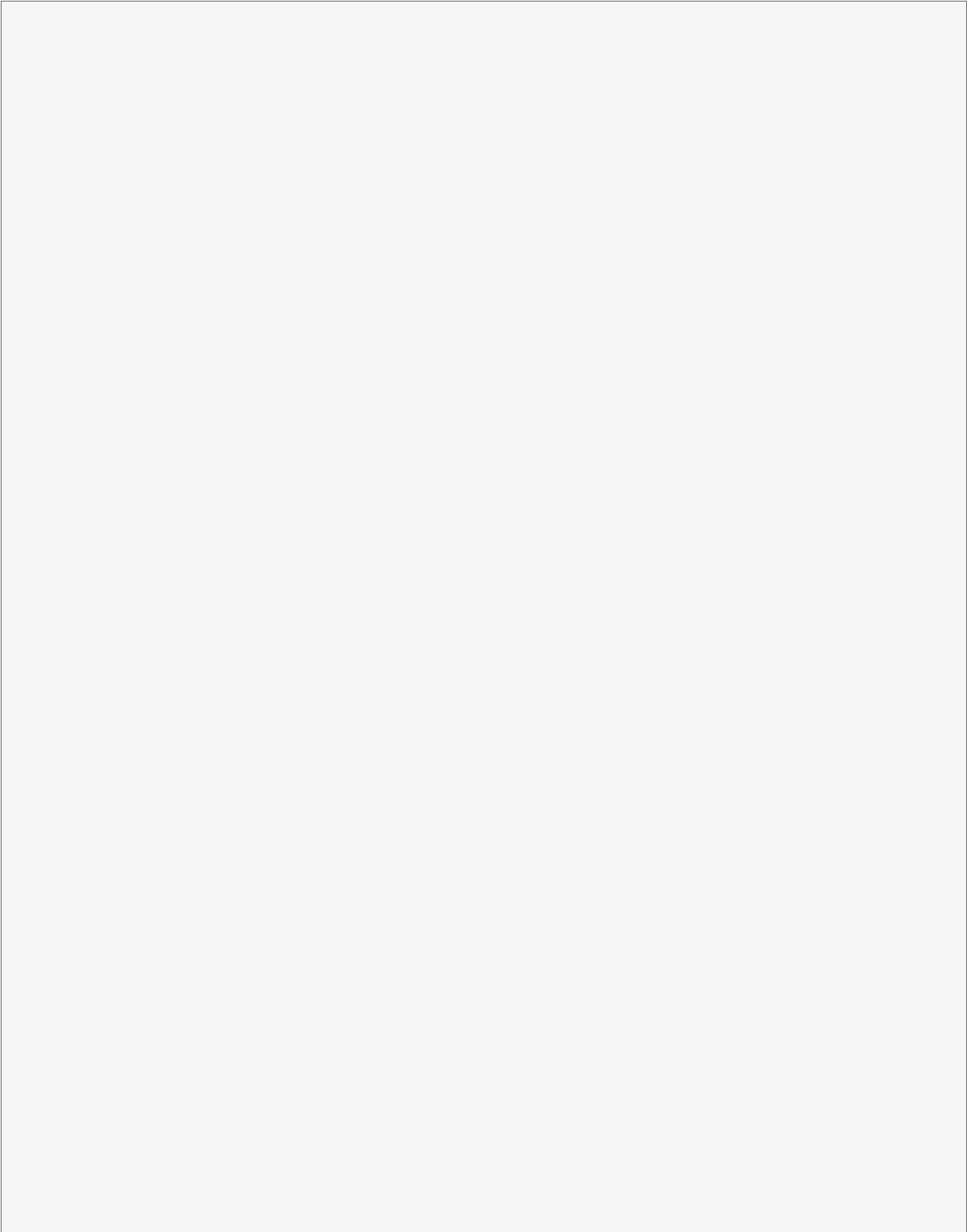
Section 14: Additional Details

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Additional Details continued...



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Section 15: Declaration & Consent (must be completed)

I/we authorise Vantage Private Finance and any lender to whom this application is made to contact my/our employers (past and present), bankers, other lenders (past and present), accountants, landlords or any other person necessary to verify the information given by me/us in this form.

	Applicant 1	Applicant 2
Print name:	<input type="text"/>	<input type="text"/>
Signature:	<input type="text"/>	<input type="text"/>
Date:	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

Use of my information:

I/We agree that:

1. Vantage Private Finance can rely upon the information I have provided in this application, which I confirm is complete and true. It is a criminal offence to knowingly supply false information to obtain a loan.
2. If any of the information in the application changes prior to the making of the advance then I will inform Vantage Private Finance.
3. Vantage Private Finance or any lender to whom we may submit your application to may undertake checks with credit reference agencies. When checking your details with the credit reference agencies a record of the search will be made which will be seen by other organisations that make searches and will create association between joint applicants. If your details are checked against any fraud prevention agencies and you give false or inaccurate information and the lender suspects fraud, this will be recorded.
4. Vantage Private Finance may store the information I have provided to it on computer or in records. I acknowledge that Vantage Private Finance will only use information for this purpose registered under the Data Protection Act 2003 and that I may request in writing a copy of the details Vantage Private Finance holds about me and shall be supplied with such details upon written request to the Data Protection Officer at Vantage Private Finance together with the payment to Vantage Private Finance of a £10 fee.

Joint Applications

By making a joint application, I am creating a financial association with the other applicant, I am also confirming that I am entitled to:

- Disclose information about the other applicant(s) and/or anyone else referred to by me
- Authorise you to search, link and/or record information at credit reference agencies about me and/or anyone else referred to by me.

Sole Applications

Information held about me by the credit reference agencies may already be linked to another individual who has an existing financial association with me. For the purposes of my application I may be treated as financially linked and my application will be assessed with reference to any "associated" records.

	Applicant 1	Applicant 2
Print name:	<input type="text"/>	<input type="text"/>
Signature:	<input type="text"/>	<input type="text"/>
Date:	<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/> / <input type="text"/> / <input type="text"/>

Your home may be repossessed if you do not keep up repayments on a mortgage of any other debt secured on it.

Click here to complete the form

Please review the information you have entered and click the above link to email this form back to Vantage Finance.

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