

# 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 \_\_\_\_\_

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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: \_\_\_\_\_

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(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**