

PURCHASE QUESTIONNAIRE (COMPANIES)



Please complete this form to the best of your knowledge.

LEAD PURCHASER DETAILS (this must be a director of the Company and authorised to provide instructions)

Title

First Name(s)

including any middle names

Surname

Email Address

Please note most communication will be sent by email

Telephone Number

Is the purchaser known under any alternative names

e.g. has name changed since birth?

Yes - please provide details below No

Date of Birth

National Insurance Number

Nationality

Home Address

Is this individual a shareholder or beneficial owner where shares held are more than 25%?

Yes No Unsure

SECOND PURCHASER DETAILS (other director(s) of the Company)

Title

First Name(s)

including any middle names

Surname

Email Address

Telephone Number

Is the purchaser known under any alternative names

e.g. has name changed since birth?

Yes - please provide details below No

Date of Birth

National Insurance Number

Nationality

Home Address

Is this individual a shareholder or beneficial owner where shares held are more than 25%?

Yes No Unsure

PURCHASE QUESTIONNAIRE (COMPANIES)



COMPANY DETAILS

Registered Business Name

Registered Trading Name
if applicable

Company Type

- Limited Company
- Partnership
- Trust
- Government
- Other

Nature of Business

Company Registration Number
if applicable

Company Registered Address

Correspondence Address
if different to the Lead Purchaser's address

Please provide the following documentation:

- Memorandum and Articles of Association
- Certificate of Incorporation
- Latest Company Accounts

- Enclosed
- To follow

SHAREHOLDER OR BENEFICIAL OWNERS (more than 25% share who are not listed above - if more than one, please provide details for all)

Full Name

Is this person authorised to provide instructions?

- Yes
- No

Home Address

Telephone Number

Date of Birth

National Insurance Number

PURCHASE QUESTIONNAIRE (COMPANIES)

PURCHASE DETAILS

Purchase Price

£

Price for any contents
if known at this stage

£

**Address of Purchase
Property**

including postcode if known

Is the Property a new build?

Yes

No

Is the Property Freehold or Leasehold?

Freehold

Leasehold

Not known

Property Type

Detached

Semi-Detached

Terraced

Flat

Maisonette

What is the proposed use of the Property?

Buying to live in

Buying to let to new tenants

Buying to let to the tenants already living
there

Holiday home

Other – please provide details below

**What are your intentions in terms of any
survey on the Property?**

Mortgage Lender Valuation

Homebuyers Survey

Full Structural Survey

No Survey

**Does the property/land you are buying
include more than one dwelling** i.e. separate
garage, annexe, cottage that can be used for
residential purposes?

Yes

No

**Do you plan to alter the property in the
future?** i.e. extension, garage conversion

No

Yes - please provide details below

Is there a related transaction?

i.e. related sale, transfer of equity, remortgage of
another property to fund this purchase

No

Yes - please provide details below

**Is there any connection between the
purchaser(s) and seller(s)?** i.e. family member
including spouses of these people or business
connection

Yes

No

Not known

**Is the property situated in a privately
managed estate?**

Yes

No

Not known

PURCHASE QUESTIONNAIRE (COMPANIES)



ESTATE AGENT DETAILS

Agents Name

Telephone Number

If you are not using an Estate Agent, please confirm how the sale was arranged and how the sale price was agreed.

FINANCIALS

Are you taking out a mortgage?

Yes
No

Proposed Mortgage Lender
if known at this stage

Mortgage Broker's details

Deposit Amount
If there is a related sale, please
leave blank

£

Has any third party provided
you/will provide you with
a financial gift/loan which
you are using towards the
purchase price?

Yes - please provide details
in the attached source of funds
questionnaire
 No

STAMP DUTY LAND TAX (SDLT)

What do you expect your Stamp Duty liability amount to be?

£

BANK DETAILS

Please provide your Company's bank account details (You must advise us if these details change)

Bank Name

Account Name

Account Number

Sort Code

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ANYTHING ELSE

Please let us know if there is anything else you wish to highlight to us, specific issues with the property or any items agreed for purchase at an additional cost to the purchase price.

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