

# TRANSFER OF EQUITY QUESTIONNAIRE



Please complete this form to the best of your knowledge.

## CLIENT DETAILS

If more than one, please print this form more than once and complete this section for all clients

**Title**

**First Name(s)**

**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**

**Occupation**

**National Insurance Number**

**Address you currently reside at/correspondence address**

This will also be the correspondence address for all purchasers

**Please confirm if you are staying on the property or coming off?**

Please note we cannot advise on whether the amount you are receiving is reflective of what you should receive or would be awarded by a family court. We recommend you seek advice from a family lawyer in this respect.

I am staying on the property (transferor)

I am coming off the property (transferee)

# TRANSFER OF EQUITY QUESTIONNAIRE



## TRANSFER DETAILS

Address of Property you are transferring

Consideration (money) being paid for the transfer

£

Has a valuation been obtained?

Yes  No

What is the value of the property?

£

Is the transfer linked to another transaction?  
i.e. Probate, Family Law Settlement

Yes - please provide details below  No

Is the Property Freehold or Leasehold?

Freehold   
Leasehold   
Not known

Property Type

Detached   
Semi-Detached   
Terraced   
Flat   
Maisonette

What is the current use of the Property?

I live in the property   
Buy to Let   
Other – please provide details in the  
'Anything else' section

Please provide the full name of the other party  
i.e. the party either coming off or staying on the property

Have they instructed their own  
conveyancer to act on their behalf?

No   
Yes - please provide their conveyancer's  
details below

Please provide your forwarding address once the Transfer has  
been completed

if different to correspondence address

Please confirm the reason for the transfer?  
i.e. divorce, gift, inheritance

# TRANSFER OF EQUITY QUESTIONNAIRE



## FINANCIALS

Is there a current mortgage on the Property?

Yes  No

Lender

Account Number

Are there any other secured loans on the property?

Yes - please provide details below  No

Outstanding Mortgage Amount

£

If you are remaining on the property, are you taking out a new mortgage?

Yes  No

Proposed Mortgage Lender  
if known at this stage

Mortgage Broker's details

Has any third party provided you/will provide you with a financial gift/loan which you are using towards this transfer?

- Yes – please provide details in the attached source of funds questionnaire
- No
- N/A – I am the transferee/coming off the property

Will anyone else (over the age of 17 years old) be residing at the property with you who are not a party to the mortgage?  
If yes, please state their full name, address and age.

Yes - please provide details below  No

# TRANSFER OF EQUITY QUESTIONNAIRE



## NOMINATED BANK ACCOUNT

Please provide your bank account details (you must advise us if these details change).

Bank Name	<input type="text"/>	Account Name	<input type="text"/>
Account Number	<input type="text"/>	Sort Code	<input type="text"/>

If there is more than one Client and a joint bank account is not provided, all Clients authorise TMT Legal Services to pay into the above nominated account.

## 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.

**Hythe • Southampton • Bitterne • Chandlers Ford • Horsham**

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