

PURCHASE QUESTIONNAIRE



Please complete this form to the best of your knowledge.

LEAD PURCHASER DETAILS

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

Occupation

National Insurance Number

Address you currently reside at/correspondence address

This will also be the correspondence address for all purchasers

SECOND PURCHASER DETAILS if applicable

If more than two purchasers, please let us know so we can provide an additional questionnaire

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

Occupation

National Insurance Number

Address you currently reside at

if different to above correspondence address

PURCHASE QUESTIONNAIRE

PURCHASE DETAILS

Purchase Price

£

Address of Purchase Property

including postcode if known

Price for any contents
if known at this stage

£

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 for yourself

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

Will anyone over the age of 16 years old (who is not a purchaser) live at the property?

No

Yes

If yes, please provide full name, address and relationship to you

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



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

£

Are you taking out a First Homes Scheme Loan with your Local Authority?

Yes
No

If yes, have you (or your mortgage broker) submitted the application to the Local Authority?

Yes
No

What percentage loan has been applied for?

 %

Do you have a Help to Buy ISA or LISA?

No

Help to Buy Lifetime ISA

Yes

How many?

Help to Buy ISA

Yes

How many?

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?

£

Do you consider all purchasers to be First Time Buyers?

If all purchasers are First time Buyers, having never owned/inherited a property anywhere in the world before, SDLT may not be payable or may be reduced.

Yes
 No

If you have a spouse (and whether or not they are a joint purchaser of this property) do they own any other properties?

- Yes my spouse/civil partner owns another property
 No my spouse/civil partner does not own any other property
 N/A I do not have a spouse/civil partner

Do you consider you will be liable for this 3% surcharge?

A 3% surcharge is payable if purchasers (or their spouses) own more than one property anywhere in the world following completion.

- No, I/we will only own this property following completion of my/our purchase.
 No, because whilst I/we will own more than one property, I am/we are replacing my/our main residence, which has or will be sold prior to completion of this purchase.
 Yes, I/we understand the 3% surcharge is payable.
 I am/we are not sure and need advice

Do you consider yourself to be an overseas resident?

A 2% surcharge is payable if you are an overseas resident, meaning you have lived abroad for 185 days of the last 365 days.

Yes
 No

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NOMINATED BANK ACCOUNT FOR RESIDUAL BALANCES

A retainer of £25 will be added to your Completion Statement to allow for any additional post completion searches required from the Land Registry. This sum, or any balance, will be returned to you following registration. Therefore, please can you provide your bank details for any residual balances to be returned to you.

Bank Name

Account Name

Account Number

Sort Code

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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