

The Customer or Client

| | | | |
|---|--|-----------------|--|
| Full Name | | Date of Birth | |
| Address | | Time at address | |
| If less than 3 years, please provide previous address | | | |

Needs Identified

| | | | |
|-------------------|---|-------------------------------------|---|
| Mortgage | £ | Term | |
| Deposit | £ | Purchase Price | £ |
| Source of Deposit | | Preference if known e.g. fixed rate | |
| Estimate | | | |
| Stamp Duty | £ | Legal Costs | £ |
| Valuation Costs | £ | Broker Fees | £ |

Existing Lending

| | | | |
|--|---|-----------------------------|---|
| Bank Loans | £ | Overdrafts | £ |
| Credit Cards | £ | Other financial commitments | £ |
| Credit status: any IVA, DMP, CCJs, Defaults, Missed Payments | | | |

Income

| If Self-Employed | Current Year | Previous Year |
|-------------------------|--------------|---------------|
| Gross Profit | £ | £ |
| Net Profit | £ | £ |
| Dividends | £ | £ |
| Salary | £ | £ |

| If Employed | Current Year | Previous Year |
|--------------------|--------------|---------------|
| Basic Salary | £ | £ |
| Overtime | £ | £ |
| Bonus | £ | £ |

Property

| | | | |
|---------------------------------|--|---------------------------------------|--|
| Property Type e.g. House, Flat, | | Freehold / Leasehold | |
| Property Address | | If Leasehold, remaining term of lease | |

Regulated Advice Disclaimer

I hereby confirm that at no point during the gathering of information in completion of this initial short-form fact find was any advice offered or given by Sword Finance

| | | |
|-----------|--------|------|
| Full Name | Signed | Date |
| | | |