

UK & OVERSEAS FINANCE

DETAILED QUOTE FORM - APPLICANT 1/2

PRIVATE AND CONFIDENTIAL

Title:(Mr/Mrs/Ms/Miss) _____ Name of applicant: _____
 Marital status: _____ Nationality: _____
 Tel home: _____ Work: _____ Mobile: _____ Best time to contact _____
 E-Mail: _____ Date of birth: _____
 Current address: _____ Post code: _____
 Status:(owner/tenant/living with friend/family/provided by employer/rent-free/other) _____
 Smoker / non smoker ? : _____ How long have you been at current address ? _____

EMPLOYED APPLICANTS ONLY (IF SHAREHOLDING MORE THAN 20%: - SEE BELOW)

Occupation: _____ Length of time in employment: _____
 Name of employer: _____ Employers country of origin: _____
 Annual salary: _____ Net income per month (after tax): _____
 Overtime/bonus/ commission: _____ Is this GUARANTEED ? YES/NO _____

SELF EMPLOYED APPLICANTS ONLY (SHAREHOLDING MORE THAN 20% ONLY)

Occupation: _____ How many years accounts available ? _____
 Type of business: PLC/limited company/ partnership/ sole trader _____
 Are you a shareholder ? YES / NO _____ What is your % ? _____

SOLE TRADERS/PARTNERSHIPS/CONTRACTORS

Net profit:
 Year: _____ £ _____ Year: _____ £ _____ Year: _____ £ _____

DIRECTORS OF LIMITED COMPANIES/PLCs ONLY

Year: _____ Salary:£ _____ Dividend:£ _____
 Year: _____ Salary:£ _____ Dividend:£ _____
 Year: _____ Salary:£ _____ Dividend:£ _____

***OTHER INCOME**

Rent received: _____ £ _____ Pension: _____ £ _____ Investments: _____ £ _____
 Other: _____ £ _____ * Please give details on last page

PROPERTY DETAILS

Main Residence (value): _____ £ _____
 Other property (value): _____ £ _____

(Please continue on another sheet or reverse if necessary)

LIABILITIES

| | BALANCE | MONTHLY | DATE WILL BE REPAYD * |
|----------------------------|---------|---------|-----------------------|
| Mortgage (main residence): | £ _____ | £ _____ | _____ |
| Other mortgages: | £ _____ | £ _____ | _____ |
| Rent: | £ _____ | £ _____ | _____ |
| Bank loans: | £ _____ | £ _____ | _____ |
| Car loans: | £ _____ | £ _____ | _____ |
| Other loans: | £ _____ | £ _____ | _____ |
| Credit cards: | £ _____ | £ _____ | _____ |
| Maintenance/alimony: | £ _____ | £ _____ | _____ |
| School fees: | £ _____ | £ _____ | _____ |
| Other debts: | £ _____ | £ _____ | _____ |

Have you made any late payments on loans/credit cards/mortgages? YES/NO

Do you have any CCJs or defaults ? YES/NO

If Yes, please provide full details separately

* will this be repaid before the commencement of your new loan ?

UK & OVERSEAS FINANCE DETAILED QUOTE FORM - APPLICANT 2

PRIVATE AND CONFIDENTIAL

Title:(Mr/Mrs/Ms/Miss) _____ Name of applicant 2: _____
 Marital status: _____ Nationality: _____
 Tel home: _____ Work: _____ Mobile: _____ Best time to contact _____
 E-mail: _____ Date of birth: _____
 Current address: _____
 _____ Post code: _____
 Status:(owner/tenant/living with friend/family/provided by employer/rent-free/other) _____
 Smoker /non smoker?: _____ How long have you been at current address? _____

EMPLOYED APPLICANTS ONLY (IF SHAREHOLDING MORE THAN 20%: - SEE BELOW)

Occupation: _____ Length of time in employment: _____
 Name of employer: _____ Employers country of origin: _____
 Annual salary: _____ Net income per month (after tax): _____
 Overtime/bonus/ commission: _____ Is this GUARANTEED? YES/NO _____

SELF EMPLOYED APPLICANTS ONLY (SHAREHOLDING MORE THAN 20% ONLY)

Occupation: _____ How many years accounts available? _____
 Type of business: PLC/limited company/partnership/sole trader _____
 Are you a shareholder? YES / NO _____ What is your %? _____

SOLE TRADERS/PARTNERSHIPS/CONTRACTORS

Net profit:
 Year: _____ £ _____ Year: _____ £ _____ Year: _____ £ _____

DIRECTORS OF LIMITED COMPANIES/PLCs ONLY

Year: _____ Salary:£ _____ Dividend:£ _____
 Year: _____ Salary:£ _____ Dividend:£ _____
 Year: _____ Salary:£ _____ Dividend:£ _____

***OTHER INCOME**

Rent received: _____ £ _____ Pension: £ _____ Investments: _____ £ _____
 Other: _____ £ _____ * Please give details on last page

PROPERTY DETAILS

Main residence (value): _____ £ _____
 Other property (value & type - ie rented/holiday/investment/other): _____ £ _____
 (Please continue on another sheet or reverse if necessary)

LIABILITIES

| | <u>BALANCE</u> | <u>MONTHLY</u> | <u>DATE WILL BE REPAYED *</u> |
|----------------------------|----------------|----------------|-------------------------------|
| Mortgage (main residence): | £ _____ | £ _____ | _____ |
| Other mortgages: | £ _____ | £ _____ | _____ |
| | £ _____ | £ _____ | _____ |
| Rent: | £ _____ | £ _____ | _____ |
| Bank loans: | £ _____ | £ _____ | _____ |
| | £ _____ | £ _____ | _____ |
| Car loans: | £ _____ | £ _____ | _____ |
| Other loans: | £ _____ | £ _____ | _____ |
| Credit cards: | £ _____ | £ _____ | _____ |
| Maintenance/alimony: | £ _____ | £ _____ | _____ |
| School fees: | £ _____ | £ _____ | _____ |
| Other debts: | £ _____ | £ _____ | _____ |

Have you made any late payments on loans/credit cards/mortgages? YES/NO _____
 Do you have any CCJs or defaults? YES/NO _____
 * will this be repaid before the commencement of your new loan? _____

If Yes, please provide full details separately

UK & OVERSEAS FINANCE PROPERTY DETAILS

COUNTRY: _____

Address/Location: _____

Property Description: _____

Purchase Price / Valuation: _____

Deposit (Your contribution): _____

If already owned please confirm date of purchase _____

Loan Amount Required : (please indicate which currency this amount is stated in) _____

Term of years required? _____

Purpose of Loan: (Purchase/Construction/Home Improvements/Remortgage) _____

Currency Required: _____

Source of your deposit/contribution: _____

Type of Mortgage Required ? _____

(Repayment / Interest Only / Other): _____

Additional cost of Home Improvements ? : _____

Is the property to be constructed ? : _____

Y/N _____

If Yes, please give completion date and schedule of when funds are required: _____

Name and Address of Builder/Developer ? : _____

Use of Property: Main Residence / Vacation Home / Retirement / Rental _____

Is the property to be used under a "leaseback" scheme ? _____

Other Information:

DECLARATION:

These particulars are believed to be complete and correct and may be disclosed to appropriate parties in connection with pre-qualification, financing and purchasing or real estate. If it is incomplete I/We accept that I/We may not receive advice appropriate to my/our circumstances.

I/We agree that the Advisor may take up any references it considers necessary for the confirmation of all the particulars and for Credit Assessment

UK BASED APPLICANTS ONLY (as required under the Data Protection Act 1984) - I/We confirm that I /We will have access to our personal records held on any computer files. I/We consent to the processing and storage of personal information on computer and/or paper files. I/We understand that processing may occur outside the European Economic Area.

Name of Applicant 1

Signature

Date

Name of Applicant 2

Signature

Date

If you are an Introducer, you may sign on behalf of your client. By signing below, you confirm that you have the consent of your client(s) to do so and that the information disclosed is complete and correct.

Full name

Signature

Date

Please return to:

LEA Financial Services Ltd

6 Keppel Place, Stoke, Plymouth, Devon PL2 1AX UK

TEL: +44 (0)1752 561981 FAX: +44(0)1752 565795

E-Mail: enquiries@lea-financial-services.co.uk

Web: lea-financial-services.co.uk