

Personal Details Questionnaire

Please complete the following personal contact details

1 Please supply us with your FULL NAME and TITLE below:

Title

Mr/Mrs/Miss/Ms/Dr/Other _____

Full Name

First Name(s) _____

Surname _____

Please can you give us your Home (and Correspondence address if different to Home):

Home Address

_____ Post Code _____

Correspondence

Address (if different)

_____ Post Code _____

Phone Home / Work

_____ Work _____

Mobile

Email Address

Date of Birth:

National Insurance No.

Do you prefer contact by

Email or Post?

Do you want Internet access to online tracking of your case (at no extra charge)?

Yes / No

Do you give any Estate Agents involved in your transactions permission to access internet tracking? (Recommended)

Yes / No



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2 Are you selling or buying jointly with any other person?

Yes / No

If Yes, please give details of all other persons involved below.

Please give address of the other joint person for Home (and Correspondence if different to Home):

Title

Mr/Mrs/Miss/Ms/Dr/Other _____

Full Name

First Name(s) _____

Surname _____

Home Address

_____ Post Code _____

Correspondence

Address (if different)

_____ Post Code _____

Phone Home / Work

Mobile

_____ Work _____

Email Address

Date of Birth:

National Insurance No.

2B Your Personal Bank Details:

Bank Name

Account Name

Sort Code

Account No.

Joint A/C: Yes / No



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We appreciate that you may be reluctant to provide your bank details to us at this early stage.

Please note the following:

1. Your bank details will be used to ensure that funds are received from you and not an unauthorized third party.
2. We will use your bank details to arrange for payments to be made to you quickly.
3. If your bank details change (at any time) from those given on the form such change will not be actioned until we have received your verbal confirmation after we call you.

4. Our bank details will not change. If you are ever informed that they have by whatever means, then you must immediately speak to a director who will be able to confirm any change and who will be able to access sufficient details about your transaction to satisfy you that you are speaking to a legitimate person.

3 Are you?

Selling only / Buying only / Selling & Buying / Remortgaging

For the property to be sold please state the full names of all of the registered owners listed on the title

For the property to be purchased please state the full names of all of the people to become the new registered owners

If a joint application is the property to be sold registered in a sole name?

Yes / No

If so whose name

If a joint application is the property to be sold registered in a joint name?

Yes / No

If so whose names

Or is the property to be purchased to be registered in a sole name?

Yes / No

If so whose name

Or is the property to be purchased to be registered in a joint name?

Yes / No

If so whose names



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4 If you are selling and buying, do the two transactions need to be completed together?

Yes / No

5 How did you come to contact us?

- a Previous Client Y / N
- b CTW Website Y / N
- c Yellow Pages Y / N
- d Thomson Directory Y / N
- e Recommended by Agent Y / N
- f Recommended by Lender Y / N
- g Other Y / N

Please Give Details;

→
→
→

6 If there is any other information relevant to the transaction (e.g. holiday dates), then please use the space below to inform us.

7 Please indicate whether you wish us to prepare your Will: - **Yes / No**

For our Conveyancing clients we offer a concessionary single will rate of £125.00 plus VAT instead of our standard rate of £185.00 plus VAT.

For a joint will a concessionary rate of £199.00 plus VAT instead of the standard rate of £295 plus VAT.

Signed

Signed

Date