



PSP WEALTH MANAGEMENT LTD
181/183 Ford Green Road, Smallthorne, Stoke on Trent,
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The information requested in these pages is entirely confidential. Periodically your independent financial advisor may have to confirm that the information is current.

The personal and financial information provided in this document will be used in assisting your independent financial advisor in offering you the best advice as required by the Financial Services and Markets Act 2000. The personal data provided will be stored and used in accordance with the Data Protection Act 1998.

PSP Wealth Management Ltd is an appointed representative of Personal Touch Financial Services Ltd which is authorised and regulated by the Financial Services Authority.

PSP Wealth Management Ltd, Registered in England & Wales, No 4957755 - 181-183 Ford Green Road, Smallthorne, Stoke-on-Trent, Staffordshire, GBR, ST6 1PF

YOUR HOME MAY BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON YOUR MORTGAGE

Loan Requirements	
Loan Amount	
Loan Term	
Loan Purpose	

Personal Details		
	Applicant 1	Applicant 2
Title:		
Forename:		
Middle Name:		
Surname:		
Date Of Birth:		
NI Number:		
Daytime telephone:		
Evening telephone:		
Mobile telephone:		
Marital Status:		
Previous Name:		
Nationality:		
Smoker:	Yes/No	Yes/No

Your Home		
Home Address:		
Postcode:		
Date moved in:	Dd/mm/yyyy	Dd/mm/yyyy
Residence Status:		
How many years/months have you been on the electoral role at your current address? :		
If less than 3 years last addresses:		
Address:		
Postcode:		
Residence Status:		
Date moved in:	Dd/mm/yyyy	Dd/mm/yyyy
Date left:	Dd/mm/yyyy	Dd/mm/yyyy
Address:		
Postcode:		
Residence Status:		
Date moved in:	Dd/mm/yyyy	Dd/mm/yyyy
Date left:	Dd/mm/yyyy	Dd/mm/yyyy

Employment Details

Principal employment status: Emp/SE/Cont/UnEm/	<input type="checkbox"/> Permanent Employed <input type="checkbox"/> Self Employed <input type="checkbox"/> Temporary Employed <input type="checkbox"/> Contract Worker <input type="checkbox"/> Part Time employee <input type="checkbox"/> Voluntary <input type="checkbox"/> Un-Employed <input type="checkbox"/> Retired	<input type="checkbox"/> Permanent Employed <input type="checkbox"/> Self Employed <input type="checkbox"/> Temporary Employed <input type="checkbox"/> Contract Worker <input type="checkbox"/> Part Time Employee <input type="checkbox"/> Voluntary <input type="checkbox"/> Un-Employed <input type="checkbox"/> Retired
Hours of Work:	Full Time / Part Time	Full Time / Part Time
Occupation:		
Employers Name:		
Employers Address:		
Postcode:		
Date started employment:	Dd/mm/yyyy	Dd/mm/yyyy
Date left employment:	Dd/mm/yyyy	Dd/mm/yyyy

Income Details

	Applicant 1	Applicant 2
Employed Income		
Main Basic Income (Annual Gross):	£	£
Regular Overtime (Annual Gross):	£	£
Bonus (Annual Gross):	£	£
Commission (Annual Gross):	£	£
Car Allowance (Annual Gross):	£	£

Existing Mortgage Details:						
Existing Mortgage:	Original Loan	Original Term	Current Balance	Remaining Term	Monthly Payment	Interest Rate
Capital & Interest:						
Interest Only:						
Lender:				Account Number:		
Type of interest rate:	Flexible <input type="checkbox"/>	SVR <input type="checkbox"/>	Fixed <input type="checkbox"/>	Capped <input type="checkbox"/>	Discount <input type="checkbox"/>	
Are there any repayment charges on your existing mortgage:			Yes/No			
Current redemption penalties:	£	End Date:				
Is your existing mortgage portable to a new property:			Yes/No			
If selling your existing property, what is the sale price?			£	Owner:	App 1/App 2	

Liabilities (Loan/Credit cards)				
Type	Amount	End Date	Redemption penalties	Owner
	£		£	App1/App2
	£		£	App1/App2
	£		£	App1/App2

Current Situation		
	Applicant 1	Applicant 2
Value of your property? :	£	£
Type of House: i.e detached/semi/bungalow/		
Is the property of standard construction:	Yes/No	
Number of bedrooms:		
Tenure:	Freehold/Leasehold	

Client Confirmation

This information has been provided in strictest confidence and it places me/us under no obligation. Advice and recommendations will be made based on the information detailed on this form. I/we understand that where I/we have declined to provide information, the advice or recommendations put forward by Personal Touch Financial Services Ltd will be correspondingly restricted and will not take into account all of my/our personal circumstances.

I hereby authorise you to release any information required to assist in the processing of my/our application

Client has agreed to the above condition(s):

Signature:

Client Name:

Date:

Signature:

Client Name:

Date:

Express Consent

I/we consent to you calling us from time to time to review my/our situation and to bring to my/our attention products that maybe suitable to my/our situation

Client has agreed to the above condition(s):

Signature:

Client Name:

Date:

Signature:

Client Name:

Date:
