



CLARK MARSHALL  
ASSOCIATES LTD

CMA HOUSE • 5 SUMMERHILL ROAD • DARTFORD • KENT • DA1 2LP

T: 01322 223331 • F: 01322 223332 • E: INFO@CLARKMARSHALL.CO.UK • W: CLARKMARSHALL.CO.UK

## SHARED OWNERSHIP ENQUIRY FORM

Name of Housing Association:		
	<b>Applicant 1</b>	<b>Applicant 2</b>
Full Name(s) :		
Date of birth:		
Number of dependants: Age of each dependant:		
Current Address:		
Postcode:		
Best contact telephone numbers:		
Email address:		
Lived in the UK for the last 2 years?	Yes / No	Yes / No
Do you have <u>permanent</u> UK residency?	Yes / No	Yes / No
If you were born outside of the UK, state how long you have lived in the United Kingdom?	years      months	years      months
If you <u>do not have permanent residency</u> , please provide details of your visa/ work permit here:		



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**Employed People only**

Occupation:		
Start date with current employer (dd/mmm/yyyy)?	/ /	/ /
Permanent contract?	Yes / No	Yes / No
Details of any outstanding probation (if applicable):		
If you are on a fixed contract, please give details of the start & end dates:	Start: / / End: / /	Start: / / End: / /
<u>Basic</u> Salary before tax per annum:	£	£
<u>Guaranteed</u> Allowances	£	£
Please state the reason e.g. London Weighting and/or Car Allowance) per annum:	_____	_____
	£	£
	_____	_____
<u>TOTAL</u> (Basic + Guaranteed Allowances) per annum:	£	£
Regular Overtime / Commission per annum:	£	£
Bonus per annum	£	£
(please indicate if paid monthly, quarterly or annually)	Mnth / Qrter / Annual	Mnth / Qrter / Annual
What is your average take home pay per month after deductions? (taken from your most recent 3 payslips):	£	£



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**Self-Employed People only**

Sole Trader or Limited Company?		
How many years' accounts or self-assessed tax returns are available?		
Type of Business?		
Date business established?	Date:	Date:
Last year's net profit:	£	£
Previous year's net profit:	£	£
Year before net profit:	£	£
<b><u>Limited Company only:</u></b>		
Director's salary for last year?	£	£
Director's salary for previous year?	£	£
Dividend income for last year?	£	£
Dividend income for previous year?	£	£

**All applicants**

<b><u>Details of any other additional income:</u></b>		
Child Benefit (per annum):	£	£
Child Tax Credit (per annum):	£	£
Working Tax Credit (per annum):	£	£
Maintenance income (court order or CSA only)	£	£
Investment or Private Pension income:	£	£
2 <sup>nd</sup> job (please provide full details):	£	£
Are you able to provide proof of the above stated additional income?	Yes / No	Yes / No



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**Credit / Other regular commitments**

How many credit/store cards do you have?		
Total amount outstanding on all your cards? (including 0% balance transfer cards)	£	£
Do you clear the whole balance each month?	Yes / No	Yes / No
Do you have any unsecured loans or Hire Purchase agreements?	Yes / No	Yes / No
What are your total monthly payments on each of the above?	£                      Cards £                      Loans	£                      Cards £                      Loans
How long left to run on each loan?	yrs              months yrs              months	yrs              months yrs              months
Car Finance / Lease? Monthly payment How long left to run?	Yes / No £ yrs              months	Yes / No £ yrs              months
If you are making child maintenance payments please state how much and until when.	£ yrs              months	£ yrs              months
If you are making payments for Child care please state how much per month.	£	£
If you have any regular deductions from your salary please state the amount per month.  If other state the reason below the amount	Pension £ Student Loan £ Season Ticket £ Other £	Pension £ Student Loan £ Season Ticket £ Other £
Have you <b>ever</b> had a mortgage or loan application refused?	Yes / No	Yes / No
Have you <b>ever</b> been in arrears, incurred County Court Judgements, Defaults, missed/late payments or been declared bankrupt?  <b>If yes please provide full details separately.</b>	Yes / No  <b>FAILURE TO ANSWER THIS QUESTION ACCURATELY WILL AFFECT YOUR CHANCES OF OBTAINING A MORTGAGE.</b>	Yes / No  <b>FAILURE TO ANSWER THIS QUESTION ACCURATELY WILL AFFECT YOUR CHANCES OF OBTAINING A MORTGAGE.</b>



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### Savings / Deposit

PLEASE NOTE: You will need up to £3,000 - £4,000 to cover your legal and mortgage set-up costs. This will be in addition to any deposit that you intend to put towards the purchase.		
Please state your <u>own</u> current savings here:	£	£
If you are in receipt of a monetary 'gift' from a family member please provide details here:	£	£
Is the 'gift' money held in the UK?	Yes / No	Yes / No

### Property Details

Address	
Full Market Value	£
What % are you buying	%
Value of your Share	£
Monthly service charge	£
Monthly rent	£
House or flat	

### Your mortgage arrangements

Clark Marshall Associates are specialist mortgage advisors working for you and not the lender. We are able to provide you with impartial & cost-effective advice on mortgage products available to be used with affordable housing.

It is most important that you take specialist advice since not all lenders will consider these schemes. Selecting the wrong lender or using a mortgage advisor not familiar with these schemes could delay your purchase.

We have an experienced team of specialist advisors and administrators that will guide you through the whole process from the initial assessment right through to moving into your chosen property.

There is no obligation to take the mortgage advice that is offered.

Your home may be repossessed if you do not keep up repayments on your mortgage.