

RUBIN / LEWIS / O'BRIEN

**PROPERTY CLIENT QUESTIONNAIRE**

The information requested below is important to enable us to ensure that your details are accurate on our systems. Please ensure that you complete the form accurately.

<b>CLIENT 1</b>	
Title	
Full Name/Company Name	
Date of Birth	
Full Address	
Home Telephone Number	
Mobile Telephone Number	
Work Telephone Number	
Email Address	
Occupation and Employer	
<b>CLIENT 2</b>	
Title	
Full Name	
Date of Birth	
Full Address	
Home Telephone Number	
Mobile Telephone Number	
Work Telephone Number	
Email Address	
Occupation and Employer	
Please advise how you would prefer to receive written correspondence & documents for signature: <input type="checkbox"/> Post only <input type="checkbox"/> Email only <input type="checkbox"/> Email (documents for signature required by post)	
Can we accept instructions from anyone of you or do you require all applicants to be consulted? All Applicants <input type="checkbox"/>  One Applicant <input type="checkbox"/>	
<b>Please advise how you heard about us:-</b>	
<input type="checkbox"/> You are an Existing Client	<input type="checkbox"/> Member of Staff (who?).....
<input type="checkbox"/> Estate Agents (which?) .....	<input type="checkbox"/> Internet which?).....
<input type="checkbox"/> Financial Advisor (which?).....	<input type="checkbox"/> Recommendation (who?).....
<input type="checkbox"/> Advert (which?).....	<input type="checkbox"/> Other.....
<b>Your Will</b>	
It is important as a Property Owner that you make a Will. Do you wish us to supply you with details and likely costs at no obligation? Yes <input type="checkbox"/> No <input type="checkbox"/>	

<b>Sale Property</b>	
Sale Property Address	
Sale Price:	£
<b>Title Deeds</b>	
Please advise who holds the title deeds and provide us with a letter addressed to them authorising the release of the title deed	
<b>Mortgage Details</b>	
Mortgage Lender	
Mortgage Account Numbers	
Approximate Amount Outstanding	£
Do you have any second charges/secured loans?	
If yes, please provide the lender details and account numbers	
<b>Leasehold Property</b>	
Management Company name, address and reference number:	
<b>Estate Agent</b>	
Your Estate Agent and their contact details:	
Fees Agreed	
<b>Property Shares</b>	
Is the sale due to a marital split?	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please provide us with the Court Order if applicable.
If yes, have shares been agreed?	

**Please supply a postal address for you following completion of your sale:-**

- Purchase Address (if applicable)
- Current Correspondence Address
- Other.....

In the event that there are monies due back to you. Please advise how you would like the monies to be sent to you:-

By BACS Transfer (within 3 working days)

Or

By Telegraphic Transfer (same day)

There is an Administration Charge for the telegraphic transfer of £35.00+ VAT

**Please complete your bank details below, in an event that there may be monies due back to you**

Bank and Branch	
Account Name	
Account Number	
Sort Code	

**Please Sign and Date below**

Signed (Client 1)	
Signed (Client 2)	
Dated	