



**CLIENT ENQUIRY FORM FOR MORTGAGES/GENERAL INSURANCE**

**PART 1**

Introducer Name: **Alan Zelinsky/Margaret Hill**

Network Code: **2038A/B**

Introducer Company: **Lifetime Financial Partnership Ltd**

IDL

Contact Number: **020 8343 7777**

E-mail address: **enquiries@lifetimefinancial.co.uk**

What is the best time to contact you? ..... (9.00 am – 6.00 pm)

Who is the principal contact if joint application? .....

What is the contact number? .....

Signed: *Alan Zelinsky*      *Margaret Hill*

Print Name: **Alan Zelinsky/Margaret Hill**

<b>APPLICANTS DETAILS</b>		
	FIRST APPLICANT	SECOND APPLICANT
SURNAME		
FORENAMES (S)		
Date of Birth	/ /	/ /
Current address		
	Postcode: Home Phone No: Business No: Mobile No:	Postcode: Home Phone No: Business No: Mobile No:
<b>Each</b> applicant to tick as applicable:	First time buyer <input type="checkbox"/> Mover <input type="checkbox"/> Remortgaging <input type="checkbox"/> Right to Buy <input type="checkbox"/> Buy to Let <input type="checkbox"/> Let to Buy <input type="checkbox"/> Further Advance <input type="checkbox"/>	First time buyer <input type="checkbox"/> Mover <input type="checkbox"/> Remortgaging <input type="checkbox"/> Right to Buy <input type="checkbox"/> Buy to Let <input type="checkbox"/> Let to Buy <input type="checkbox"/> Further Advance <input type="checkbox"/>
We can also arrange Buildings & Contents and ASU Insurance, tick if applicable:	Buildings Insurance <input type="checkbox"/> Contents Insurance <input type="checkbox"/> ASU Insurance <input type="checkbox"/>	Buildings Insurance <input type="checkbox"/> Contents Insurance <input type="checkbox"/> ASU Insurance <input type="checkbox"/>



What is your Occupation?		
Employment Status – are you?	Employed/Self-employed/Contract worker/Permanent/Pensioner/Other	Employed/Self-employed/Contract worker/Permanent/Pensioner/Other
If ‘other’ give details		
If employed: Basic Salary p.a.		
Guaranteed additional p.a. (overtime, bonus, etc)	£	£
Regular additional p.a.(overtime, bonus, etc)	£	£
Other income (Please specify)	£	£
If known loan amount required.		
Building Sum Insured if required:		

Collection of Data

You agree we may hold and process personal information for the purposes of providing financial services including mortgage advice and connected insurance. Including sensitive information about racial or ethnic group, physical or mental health, sexual life, criminal proceedings and offences. We gather information from a variety of sources including other financial institutions, employers, professional advisors and licensed credit reference agencies.

Use of Data

As an appointed representative of the M & E Network/Interdependence Network\*, which is part of the Tenet Group of companies, personal information will be passed to Tenet Network Compliance for compliance and monitoring purposes. Information may be passed to other financial firms in the course of providing services.

We may provide information to our regulators. We may also provide information to our auditors, Tenet’s auditors and professional advisors, and other firms within the Tenet Group.

We may from time to time contact you by post, fax, be-mail or telephone with details of products and services which may be of interest to you. If you would prefer not to receive this information, please indicate your preference by ticking the box here.

Applicant 1

Signature: .....

Name .....

Date .....

We shall disclose information to relevant authorities where we are required to do so by law.

Money Laundering & Financial Crime; we are legally obliged to verify the identity of our customers and retain these records. We will report suspicious transactions to Tenet Network Compliance who may in turn notify the National Criminal Intelligence Unit.

We will retain records for a minimum period of 3 years.

Access

You have the right to access information we hold about you. You can request a copy of these records by contacting the Tenet Compliance Manager or alternatively us. Contact details are as follows:-\* Delete as applicable

Tenet Network Compliance  
Compliance Manager  
Network House  
Lister Hill  
Horsforth  
Leeds  
Tel. No. – 0113 289 0011

We are entitled to charge a fee for this service of up to £10. If any of the information we hold is incomplete or inaccurate, please tell us and we will correct it.

Applicant 2

Signature: .....

Name: .....

Date .....

Return by post to 40 Oakleigh Park North, London, N20 9AR, fax to 020 8446 2836 or email to enquiries@lifetimfinancial.co.uk