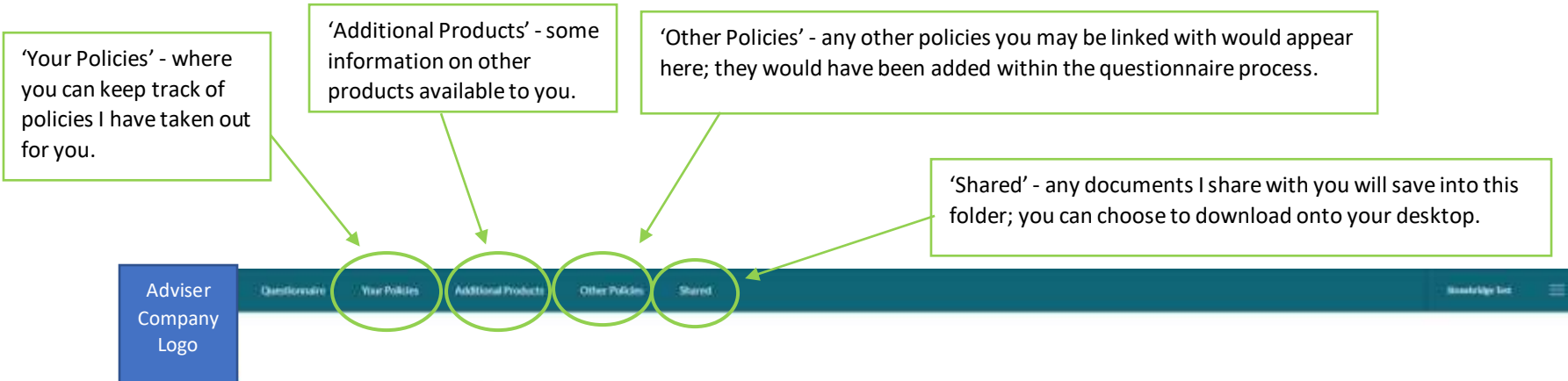


Client Portal – What is available here & How to fill in the fact find questionnaire.

Welcome to your client portal home page!



Details Listed Here:
Adviser Name
Telephone Number
Email Address

Welcome to Stonebridge Mortgage Solutions Ltd.
We need some information about you.

This will only take
5 Minutes to complete
And you will need information for:

Personal contact details	Any Liabilities
3 years of address	Any existing protections
All dependant	All credit history
Income information	Your requirements

This is where you can complete the **questionnaire** that will save time in our meeting and enable us to discuss what is important to you with your borrowing needs. Please try to complete as much information as you can.

Completing the Questionnaire

Personal Information
Part 1 of 8

Please fill in the full personal details and any other personal info. By using the add person field at the bottom of the page.

Title*
Please Select

Full name*
Knowledge Test
Please add each part of name (including initials)

Have you been known by any other names?
 Yes No

Date of Birth*
Date of Birth

Nationality*
Please Select

Right to reside**
 Yes No

Marital status*
Please Select

Smoker?* Yes No

Phone number
[Text Input]

Email address*
[Text Input]

Cancel Save

Personal Information

Part 1 of 8.

Select Title

Full Name – should already be generated – check correct spellings.

Have you been known by any other names?
Click Yes/No – if you select know another box will appear underneath to input in previous names.

Date of Birth – you can either input date in manually by DD/MM/YYYY or use the drop down for calendar.

Nationality – drop down list select correct nationality.

Right to reside? – Select Yes/No

Marital Status – drop down list to select.

Smoker? – Select Yes/No

Phone Number

Email Address – should already be generated.

Click Save to go to next page!

PLEASE NOTE - ALL * QUESTIONS WILL NEED TO BE COMPLETED TO ENABLE NEXT PAGE TO BE COMPLETED.

Personal Information
Part 1 of 8

Please fill in the full personal details and any other personal info. By using the add person field at the bottom of the page.

Knowledge Test

Save

Cancel

Once you have ticked 'Saved' the page below will appear to re check details before continuing, this is also where you can add second applicant onto questionnaire if you need to.



Address Details
Part 2 of 7

Please enter your last 3 years of address history.

Stonebridge Test
3 year history Need 36 Months

Add Address
Part 2 of 7

Please enter your last 3 years of address history.

Search by postcode or address:

Address:

Town:

County:

Postcode:

Residence from:

I currently live here

Residence status:

Address Details

Part 2 of 8.

Please input in 36 months of address history by clicking 'Add'.

Search by postcode or address. When you start typing in postcode it will come up with list of address for you to choose correct. If your address does not come up please input in manually.

Residence from – you can either input date manually DD/MM/YYYY or use drop down for calendar.

'I currently live here' will be ticked but if it's a previous address please untick. Once unticked will ask for move out date.

Residence Status – Homeowner or Tenant/Living with Friends/Family Either one of these options you choose will open more questions. I.e., Homeowner will ask if there is a mortgage on the property then if you tick yes you will need to add in some mortgage details (provider, current monthly payment, mortgage balance)

PLEASE NOTE - ALL * QUESTIONS WILL NEED TO BE COMPLETED TO ENABLE NEXT PAGE TO BE COMPLETED.

Address Details
Part 2 of 7

Please enter your last 3 years of address history.

Stonebridge Test
3 year history Need 36 Months

Please confirm your current address.

If you have not completed your current address / 36 months of address history, please click add to completed.

Once completed all 36 months of address history, it will show a green bar like below and you can click next to part 3.

Address Details
Part 2 of 7

Please enter your last 3 years of address history.

Stonebridge Test
3 year history Completed

1 Personal Information 2 Address 3 **Dependants** 4 Income 5 Utilities 6 Protection 7 Credit History 8 Requirements

Dependants

Part 1 of 1

For you and your partner(s) please fill in any dependants below.

Do you have any dependants?

Yes No

Dependants

Part 2 of 1

For you and your partner(s) please fill in any dependants below.

Full Name*

Please put spacing between all names (including middle)

DOB

dd/mm/yyyy

Dependent On*

Please Select

Relationship

Until what age?

Dependants

Part 3 of 8.

Do you have any dependants –
Please tick Yes/No if you have any children.

Ticking Yes will bring up an 'Add' button to input in child details.

Full Name of child

Date of Birth – you can either input in date manually DD/MM/YYYY or use drop down for calendar.

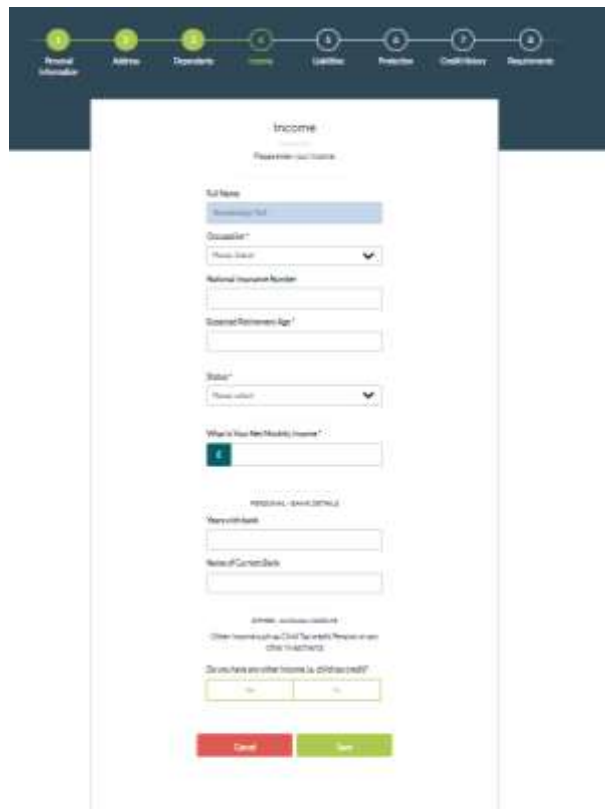
Dependent On – whether child is only dependant on you or second applicant.

Relationship to who child is dependent on

Until what age are, they dependant on?

Once saved if you need to add another child on click 'Add' button again.

PLEASE NOTE - ALL * QUESTIONS WILL NEED TO BE COMPLETED TO ENABLE NEXT PAGE TO BE COMPLETED.



Income

Part 4 of 8.

Click 'Edit' to input in Income details.

Occupation – please select from drop down list.

National Insurance Number

Expected Retirement Age

Status – Select whether you are.

Employed – once selected will open up more questions, employer details and basic pay.

Self Employed – once selected will open up more questions, business name, type of business, time you have been self-employed for, profits 3 years, accountant details, net monthly income.

Retired – once selected will open up to confirm net monthly income.

Or Unemployed

Personal – Bank Details

Years with Bank

Name of Current Bank

Other – Annual Income such as Child Tax Credit or any other investments

Ticking Yes will bring up more questions where you will need to input in annual income for Working Tax credits, Child Tax credits, Child benefits, Pension Income, Investment income, Maintenance income or Other income.

PLEASE NOTE - ALL * QUESTIONS WILL NEED TO BE COMPLETED TO ENABLE NEXT PAGE TO BE COMPLETED.

Progress bar: 1 Personal Information, 2 Address, 3 Dependents, 4 Income, 5 Liabilities, 6 Protection, 7 Credit History, 8 Repayments

Liabilities

Part 5 of 8

Please you and your partner(s) please fill in any Liabilities below.

Do you have any liabilities?

Yes No

Next Save

Liabilities

Part 5 of 8

Please enter your Liability.

Type?*

Please select

Lender?

Repay with mortgage?

Yes No

Relevant to*

Please Select

Cancel Save

Liabilities

Part 5 of 8.

Please select Yes/No whether you have any liabilities. I.E any Loans/Hire Purchases, any credit cards or overdraft.

If you do select Yes, please click on 'Add' button to input details in.

Type of Liability

Lender

Repay with Mortgage – Select Yes/No

Relevant To – where liability is relevant to only you or both applicants on questionnaire.

Click Save. You can add on as many liabilities as you have.

PLEASE NOTE - ALL * QUESTIONS WILL NEED TO BE COMPLETED TO ENABLE NEXT PAGE TO BE COMPLETED.

Protection

Part 6 of 8

Please enter any Protection or Insurance by answering the questions below.

Do you have Death In Service?

Yes	No
-----	----

Do you have Employer Sick Pay?

Yes	No
-----	----

Do you have Life Assurance?

Yes	No
-----	----

Do you have Healthcare Protection?

Yes	No
-----	----

Do you have Building & Contents Insurance?

Yes	No
-----	----

Back

Next

Death In Service

Part 7 of 8

Please enter any death in service.

Amount of cover:

£

Relevant to*

Please Select

Cancel

Save

Protection

Part 6 of 8.

Please tick Yes/No as to whether you have:

Death in Service

Employer Sick Pay

Life Assurance

Healthcare Protection

Buildings & Contents Insurance

If you select Yes to any, it will bring up 'Add' button to input in Amount of Cover and who it is relevant to either just you or both applicants on questionnaire.

PLEASE NOTE ALL * QUESTIONS WILL NEED TO BE COMPLETED TO ENABLE NEXT PAGE TO BE COMPLETED.

Credit History

Part 7 of 8

Please enter any debts or current credit cards by clicking on the links in the table.

Have either/both individuals ever had CCJ's or loan defaults?

Yes No

Have either/both individuals ever had mortgage arrears?

Yes No

Have either/both individuals ever been declared bankrupt?

Yes No

Have either / both individuals ever entered into an IVA or debt management plan?

Yes No

Have either/both individuals ever been subject to a repossession?

Yes No

CCJ's or loan defaults:

Part 7 of 8

Type

Please select

Date registered

Administrations

£ Amount

Date satisfied

Administrations

Relevant to

Please Select

Credit History

Part 7 of 8.

Please tick Yes/No as to whether you have:

Ever had CCJ's or loan defaults?

Ever had mortgage arrears?

Ever been declared bankrupt?

Ever entered an IVA or debt management plan?

Ever been subject to a repossession?

If you select Yes to any, it will bring up 'Add' button to input in type, when registered, amount, date if satisfied, who it is relevant to.

PLEASE NOTE ALL * QUESTIONS WILL NEED TO BE COMPLETED TO ENABLE NEXT PAGE TO BE COMPLETED.

Your Requirements

Part 8 of 8.

What kind of mortgage do you require? Please choose either purchase or Remortgage

Selecting Remortgage will bring up more questions.

What is it for? Either buy to let or Residential

Buying Scheme.

Selecting Purchase will be bring up more questions.

What is it for? Buy to let of Residential.

Is it a new build? Select Yes/No, selecting Yes will bring up to fill in plot number.

Search by postcode or address.

Style of property.

Purchase Price

Buying Scheme



Anything else?

Page 1 of 1

Please enter any additional information that you feel is relevant. For example a 3rd person's name and address, or any other income.

Notes

I confirm that I have checked all the information entered is correct

I consent to you holding my data in line with the [privacy policy](#)

Once your enquiry has been reviewed, we will make contact using the details provided purely for the purpose of progressing your enquiry. You will be able to confirm your marketing preferences when we issue you with a Terms of Business - we will not contact you for marketing purposes until that time.

The information on your existing cover and arrangements are for guidance only. Full current details of these arrangements can be confirmed by speaking to one of our advisers or the provider with who these arrangements are held.

Anything Else?

You have reached last part of questionnaire; please ensure you check the pages at the top before completing.

All pages should be in green, if they are still white please return back to that page and complete the missing information.

This is your chance to add in any additional notes you wish to let me know.

Please read below disclosures and tick to confirm and ...

SUBMIT

Your Client Portal

Your client portal will continue to help you, as it will be a central source of information for all products and services that we are applying for and have taken with us.

Uploading Documents

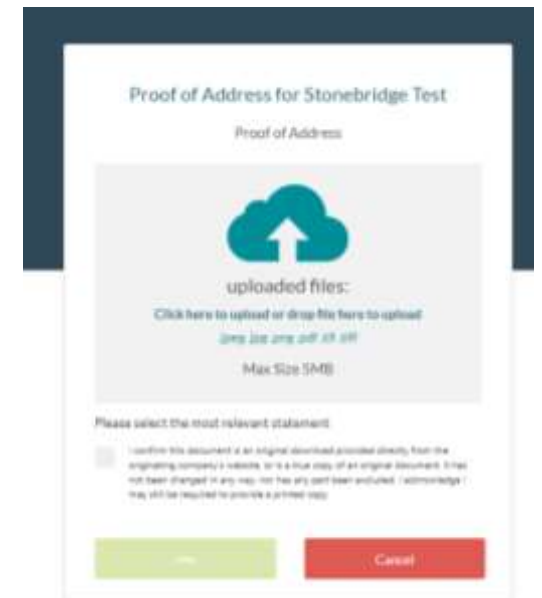
I will request documents that I need from you to progress with your mortgage needs. Once I have requested these documents a list of documents that I need will appear on your client portal home page and you will also receive a prompt email.



Step 1. Click Upload

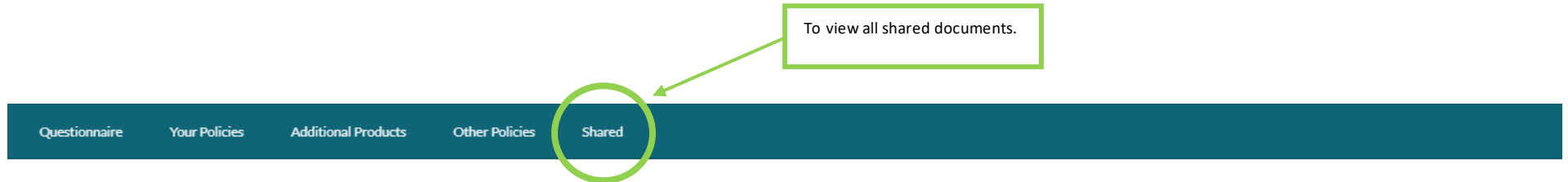
Step 2. You can either click to upload document or drag file to upload and confirm this is an original download then Save.

Step 3. The document you have just uploaded will delete off your list and send to me to review and accept. Please then upload following documents on that list.



Shared Documents

Once I have shared documents with you, you will get an email prompt to log into client portal. You can find these shared documents in 'Shared' tab and you will be able to view and download document.



Shared Documents

Name	Last Shared	Action
03/2021 ^		
NEW blank test doc - April Payslip.pdf	03/2021	Download Document