

ENQUIRY FORM

PERSONAL DETAILS

1st Applicant

Title: Mr. ☐ Miss ☐ Mrs. ☐ Other _____

Surname: _____

First Names: _____

Address: _____

Date of Birth: _____

Nationality: _____

Portuguese tax resident?: yes ☐ no ☐

Status: Single ☐ Married ☐
Separated ☐ Divorced ☐

Number of children: _____

Ages: _____

CONTACT DETAILS

1st Applicant

Telephone: _____

Skype: _____

E-mail: _____

PROFESSIONAL DETAILS

1st Applicant

Employed ☐ Self-Employed ☐ Retired ☐

Name of company: _____

Occupation: _____

Position Held: _____

Length of current employment: _____
(years)

2nd Applicant

Title: Mr. ☐ Miss ☐ Mrs. ☐ Other _____

Surname: _____

First Names: _____

Address: _____

Date of Birth: _____

Nationality: _____

Portuguese tax resident?: yes ☐ no ☐

Status: Single ☐ Married ☐
Separated ☐ Divorced ☐

Number of children: _____

Ages: _____

2nd Applicant

Telephone: _____

Skype: _____

E-mail: _____

2nd Applicant

Employed ☐ Self-Employed ☐ Retired ☐

Name of company: _____

Occupation: _____

Position Held: _____

Length of current employment: _____
(years)



ENQUIRY FORM

PROPERTY TO BE PURCHASED

Name and branch of Estate Agency: _____

Name of sales person: _____

Type and location of property: _____

Purchase price in EUR: _____

Required mortgage amount in EUR: _____

Deposit: source of funds: cash ☐ investment ☐ re-mortgage ☐

others, please specify... _____

INCOME DETAILS

1st Applicant

Salary ☐ Dividends ☐ Pension ☐

Currency:

GBP ☐ EUR ☐ USD ☐ SEK ☐ CHF ☐

Gross income: _____/year

Income net after tax: _____/year

Guaranteed bonus/overtime: _____/year

Rental Income: _____/year

Investment Income: _____/year

2nd Applicant

Salary ☐ Dividends ☐ Pension ☐

Currency:

GBP ☐ EUR ☐ USD ☐ SEK ☐ CHF ☐

Gross income: _____/year

Income net after tax: _____/year

Guaranteed bonus/overtime: _____/year

Rental Income: _____/year

Investment Income: _____/year

SAVINGS AND INVESTMENTS

1st Applicant

Currency:

GBP ☐ EUR ☐ USD ☐ SEK ☐ CHF ☐

Saving account: _____

Investments: _____

Pension fund: _____

2nd Applicant

Currency:

GBP ☐ EUR ☐ USD ☐ SEK ☐ CHF ☐

Saving account: _____

Investments: _____

Pension fund: _____



ENQUIRY FORM

PROPERTY ASSETS

1st Applicant

Currency:

GBP ☐ EUR ☐ USD ☐ SEK ☐ CHF ☐

Main Residence: Owned ☐ Rented ☐

Rent per Month: _____

Estimated value of main residence:

Number of additional properties: _____

Estimated value of additional properties:

EXISTING LIABILITIES

1st Applicant

Outstanding mortgage on main residence:

Monthly mortgage payment:

Outstanding mortgage on additional prop.:

Monthly mortgage payment:

Outstanding car loans:

Monthly car loan repayment:

Outstanding personal loans:

Monthly personal loan repayment:

Alimony payments per month:

2nd Applicant

Currency:

GBP ☐ EUR ☐ USD ☐ SEK ☐ CHF ☐

Main Residence: Owned ☐ Rented ☐

Rent per Month: _____

Estimated value of main residence:

Number of additional properties: _____

Estimated value of additional properties:

2nd Applicant

Outstanding mortgage on main residence:

Monthly mortgage payment:

Outstanding mortgage on additional prop.:

Monthly mortgage payment:

Outstanding car loans:

Monthly car loan repayment:

Outstanding personal loans:

Monthly personal loan repayment:

Alimony payments per month:

How did you hear about us?