**Pro-forma**

**FDR Mortgage Capacity Assessment type:**

Please select the relevant report:

|  |  |
| --- | --- |
| **Single report – 1 individual, based on 1 financial scenario** | |
| Is this report to be completed on a hypothetical/anonymous basis | Yes/No |
| Client/ individual name |  |
| Relationship to you/firm |  |

|  |  |
| --- | --- |
| **Joint report – 2 or more individuals, based on 1 financial scenario each** | |
| Is this report to be completed on a hypothetical/anonymous basis | Yes/No |
| Client/individual name | 1. |
|  | 2. |
|  | 3 |
|  | 4. |
| Relationship to you/firm | 1. |
|  | 2. |
|  | 3. |
|  | 4. |

**Additional scenarios**

Complete if required:

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
|  | Income type | Income amount | Deposit amount | Other variable – please specify | Other variable – please specify | Other variable – please specify |
| Scenario 1 | 1. | 1. |  |  |  |  |
|  | 2. | 2. | £ |
|  | 3. | 3. |  |
|  | 4. | 4. |  |
|  | 5. | 5. |  |
| Scenario 2 | 1. | 1. |  |  |  |  |
|  | 2. | 2. | £ |
|  | 3. | 3. |  |
|  | 4. | 4. |  |
|  | 5. | 5. |  |
| Scenario 3 | 1. | 1. |  |  |  |  |
|  | 2. | 2. | £ |
|  | 3. | 3. |  |
|  | 4. | 4. |  |
|  | 5. | 5. |  |
| Scenario 4 | 1. | 1. |  |  |  |  |
|  | 2. | 2. | £ |
|  | 3. | 3. |  |
|  | 4. | 4. |  |
|  | 5. | 5. |  |
| Scenario 5 | 1. | 1. |  |  |  |  |
|  | 2. | 2. | £ |
|  | 3. | 3. |  |
|  | 4. | 4. |  |
|  | 5. | 5. |  |

Please note for reports requiring more than 5 scenarios, our normal fees do not apply.

|  |  |
| --- | --- |
| Report due date |  |
| Express service – normal timescale for a single report is 5-10 working days, or 15 working days for a joint report. The express service allows us to prioritise your report ensuring it is completed as quickly as possible. | Yes/No |

**Additional information**

Please confirm any other information here. Please be aware that, as standard, example quotations based on fixed and variable rates of interest are provided. Please do not provide financial or personal information here, questions regarding this are detailed with in the fact find.