

PERSONAL DETAILS SECTION

**CLIENT 1**

Your Full Name (including middle names)

Date of Birth  National Insurance Number

Occupation  Employers Name

Contact Phone Numbers

Email Address

**CLIENT 2**

Your Full Name (including middle names)

Date of Birth  National Insurance Number

Occupation  Employers Name

Contact Phone Numbers

Email Address

ADDRESS SECTION

**CLIENT 1**

Home Address	Correspondence Address (if different)
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Length of time at your home address

**CLIENT 2**

Home Address	Correspondence Address (if different)
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

Length of time at your home address

## TRANSACTION DETAILS SECTION

### SELLING

1 Address of the property that you are intending to sell (if applicable)

First Line of your address

Postcode

2 Full names of the current owners of the property to be sold (if applicable)

Owner 1 Full name

Owner 2 Full name

3 Are you selling in any other capacity, e.g. Executor / Attorney / Deputy  Yes  No

4 Sale Price £

5 Is the property that you are selling  Freehold  Leasehold  Leasehold with a share of freehold

6 Is the property Shared Ownership  Yes  No

### BUYING

7 Address of the property that you are intending to buy (if applicable)

First Line of your address

Postcode

8 Full names of the buyers of the property to be bought (if applicable)

New Owner 1 Full name

New Owner 2 Full name

9 Purchase Price £

10 Is the property that you are buying

Freehold  Leasehold  Leasehold with a share of freehold  New Build

11 Is the property Shared Ownership  Yes  No

### GENERAL

12 Are you selling or buying in the name of a Company? If so please give details

13 If you are selling and buying do the transactions need to be completed together  Yes  No

## BANKING DETAILS SECTION

- Your details will be used to ensure that funds are received from you.
- We will use your bank details to arrange payments to be made to you.
- Any change to your bank details will not be actioned until you have confirmed them verbally.
- Our bank details will not change. If you are informed of a change to our bank details this is a fraud. Immediately report this to a director of this firm and take no further action on the information.

### CLIENT 1

Bank Name

Account Name

Sort Code

Account Number

Joint Account  Yes  No

### CLIENT 2

Bank Name

Account Name

Sort Code

Account Number

Joint Account  Yes  No

1 Will you be getting any money to be used in your transaction from a third party  Yes  No  
(eg: a loan or a gift from a family member, friend)

## PREFERENCES SECTION

**We strongly recommend that you answer 'Yes' to 1-3.**

1 Do you want access to online case tracking (free)  Yes  No

2 Can we give your Estate Agent / Broker access to the case tracking  Yes  No

3 Do you intend to use our mobile/tablet app for case tracking updates  Yes  No

4 Any other relevant information such as holiday dates or important information for us:

  
  

5 Everyone should have a Will. Would you like us to prepare one at a discounted price  Yes  No

## WHY DID YOU DECIDE TO USE OUR SERVICES?

1 Recommended (eg. estate agent, broker, friend)  Yes  No

If yes please give name of person / company

2 Other (eg. website, client already)  Yes  No

If yes please give details

## SIGNATURES

I/We accept your quotation and confirm that **Cook Taylor Woodhouse** are instructed to act for me/us

**CLIENT 1**

Date

**CLIENT 2**

Date

## DATA PROTECTION PRIVACY NOTICE

We use the information you provide primarily for the provision of legal services to you and for related purposes including:

- Updating and enhancing client records
- Analysis to help us manage our practice
- Statutory returns
- Legal and regulatory compliance

Our use of that information is subject to your instructions, data protection law and our duty of confidentiality.