

MORTGAGE FINANCING · CONFIDENTIAL

Mortgage Check.

Before we can find the best mortgage options for you, we need a few details about your financial situation. It only takes a few minutes to fill out your information. Your data is kept strictly confidential! The enquiry is non-binding and free of any charge.

1**Fill in**

Complete on your computer – approx. 5 minutes. You can save in between.

2**Send back**

Send the saved PDF file to us by email. No postal mail required.

3**Feedback**

We review and get back to you within 48 hours with initial terms.

**YOUR CONTACT****Benedikt Scholz**

Mortgage Advisor

01512 2978176 · benedikt.scholz@immostrategen.de

Mon – Fri, 9 am – 6 pm · Reply usually within 24 h

Mortgage advisor pursuant to §34i GewO (German Trade Regulation Act)
Intermediary reg. no.: D-W-10742GI-11

REFERRED BY

We obtain the property documents directly from the provider.

Who sent you this form?

Your Details. · SECTION 1

1 Contact & Personal Details

Name

Mobile Number

Email Address

Type of Employment

☐ Employed☐ Civil Servant☐ Freelancer☐ Self-employed

Job Title

Nationality

If you are not a German citizen, please enclose a copy of your residence permit.

2 Marital Status

Marital status

☐ Single☐ Married☐ Divorced☐ Widowed

Separation of property (if married)

☐ Yes☐ No

If married, please also enclose your partner's ID card and payslips.

3 Children & Household

List only your own children without income.

Number of Children

Persons in Household

Child 1: First Name

Date of Birth (DD.MM.YYYY)

Child 2: First Name

Date of Birth (DD.MM.YYYY)

Child 3: First Name

Date of Birth (DD.MM.YYYY)

Child 4: First Name

Date of Birth (DD.MM.YYYY)

For more than four children, please provide additional details separately.

Housing, Costs & Contracts. · SECTION 2

1 Housing & Mobility

Move-in date, current home (DD.MM.YYYY)

Current rent incl. utilities (EUR / month)

Other living expenses (EUR / month)

Number of Cars in Household

If one or more vehicles are leased, please enclose the leasing contract.

2 Existing Contracts

Please tick what applies to you.

- ☐ Private health insurance (PKV)
- ☐ Loan agreement (personal loan)
- ☐ Loan agreement (property)
- ☐ Private life insurance
- ☐ Private pension insurance

For every item ticked, please enclose a copy of the respective contract.

3 The Property to Be Financed

Key figures on purchase price and financing needs.

Purchase price (EUR)

Broker commission (%)

Desired loan amount (EUR)

Documents & Wishes. · SECTION 3

So that we can process your request right away, we need the following documents. Tick what you have enclosed.

1 Always Required

We need these documents in every case – please enclose and tick all of them.

- ☐ ID card
- ☐ Last three payslips (for self-employed, the income statement / EÜR)
- ☐ Most recent income tax assessment
- ☐ Pension statement

2 Additionally, If Applicable

Please check what is required for your situation, tick it and send it along.

- ☐ Residence permit – if not a German citizen
- ☐ Partner's ID card – if married
- ☐ Partner's payslip – if married
- ☐ Leasing contract – if vehicle(s) leased
- ☐ Private health insurance policy – if privately insured
- ☐ Loan agreement (personal / property) – if applicable
- ☐ Life / pension insurance – if privately held

3 Your Preferred Terms

Your preferred structuring of the financing.

- | | | | | | |
|------------------------|-----------------------------------|-----------------------------------|-----------------------------------|---|---------------------------------------|
| Fixed-interest period | ☐ 10 years | ☐ 15 years | ☐ 20 years | ☐ Full repayment | ☐ Not sure yet |
| Initial repayment rate | ☐ 1.5 % | ☐ 2 % | ☐ 2.5 % | ☐ 3 % | ☐ Not sure yet |
| Special repayment | ☐ 0 % | ☐ 5 % | ☐ 10 % | | ☐ Not sure yet |

What matters most to you about your financing?

Consent to processing of personal data, truthfulness

I/we hereby consent that ImmoStrategen (ein Angebot der FinFix GmbH) prepares our case for the arrangement of a loan for a property financing as well as providing related financial services and support during obtaining and afterward during disbursement of a loan.

I/we hereby authorize ImmoStrategen to forward all documents required for this purpose (loan application, property and credit-worthiness documents, etc.) to a potential lender who is to provide a financing. I/We hereby authorize ImmoStrategen to obtain loan offers and terms from a lender and to provide and receive all correspondence related to the property financing/loan on my/our behalf. I/we hereby authorize ImmoStrategen to receive a loan contract offer from a potential lender for the purpose of forwarding this offer to me/us. I/we am/are aware that a binding loan commitment can only be given by a lender and that loan commitments from lenders can be revoked at any time, especially it becomes apparent that the information I have provided is not truthful and accurate.

I/we affirm that no sanctions and enforcement measures (e.g. salary seizure, foreclosure, insolvency proceedings) have been initiated against me/us to date. I/We have always duly met my/our payment obligations in the past.

I/we act in my/our own economic interest and not on behalf of a third party (and not as a trustee).

I/we affirm that I/we have provided all the above information to the best of my/our knowledge, completely and truthfully. If applicable, false statements may lead to a cancellation of the loan contract.

PLACE, DATE

SIGNATURE

please sign here

With my signature I/we assure that the provided information is complete and truthful. I/we consent to the processing of the above personal data for the purpose of analyzing my/our mortgage options for a property purchase.