Mortgage Refix & Review Form

Oliver Broomfield Mortgage & Insurances
Mortgage & Asset Finance Car & Personal Finance Property & Personal Risk Insurance
Ph: 0272 751 555

Client Name(s):

Bank: Branch:

Account No: Suffix: Bal: Int Rate:

Suffix: Bal: Int Rate:

Suffix: Bal: Int Rate:

Suffix: Bal: Int Rate:

Property Address:

Estimated Current Market Value:

Details of Loan Due to be Refixed

Preferred fixed rate term (6mths, 1 yr, 18 mths, 2 yrs, 3 yrs, 4 yrs, 5 yrs)

Suffix: Bal:

Suffix: Bal:

Increase Repayments: Yes No

Preferred Repayment:

Repayment Frequency: Weekly, Fortnighty, Monthly

Insurance Review Form

House, Contents Car Insurances last reviewed: Month Year

Please provide competitive Quotes: Yes No

Life, Mortgage Protection, Income protection, Truama, Heath Insurances last reviewed Month Year

Has there been changes since our last review i.e. new house, increased mortgage, children, change of jobs, married?

Yes No

If Yes, a review of your insurances should be carried out.

Any Further Requirements:

Please update your preferred email address:

Please update your preferred telephone number: