



Subject: Intake form

Dear Sir / Madam,

We would like to take the time to have a look at your financial situation together with you. To be of service to you as well and efficiently as possible, we ask you to fill in the enclosed intake form as complete and extensively as possible. This allows us to focus us on giving advice during our conversation.

We kindly request you to follow the following steps:

- Save the file as a PDF via 'Save as' on your computer
- Give the document a recognizable name (preference: Intake form & own surname)
- Open the saved form and fill it in as completely as possible (the PDF is fillable)
- Save it via 'Save'
- Then add the completed and saved document to the e-mail message you send us

Thank you very much for the effort you have made.

Sincerely,

Van Bruggen Adviesgroep

Mortgage intake form

To provide you with the best possible advice, we would like to prepare ourselves as well as possible.

We therefore would like to ask you to fill in the information below.

	APPLICANT	PARTNER
GENERAL DATA		
SSN (social security number) :		
First Name :		
Initials :		
Last name :		
Address :		
Postal Code :		
City :		
Phone number :		
Date of birth :		
Birthplace :		
E-mail address :		
Nationality :		
Marital status :	☐ single ☐ living together ☐ registered partnership ☐ married ☐ separated	☐ separated
IBAN number :		
Do you pay alimony? :		
Do you have any children? :	name & date of birth: name & date of birth: name & date of birth:	
Do you smoke? :		
INCOME / WORK / PROVISIONS		
Fixed gross annual income:	€	€
Variable gross annual income :	€	€
Name of employer :		
Employment :	☐ permanent employment ☐ temporarily ☐ independently	☐ permanent employment ☐ temporarily ☐ independently
Declaration of intent :		
Other :	☐ (early retirement) VRS / pension ☐ benefit ☐ other ...	☐ (early retirement) VRS / pension ☐ benefit ☐ other...

GENERAL QUESTIONS

What is the reason for the conversation?

- ☐ Purchase new home (existing construction)
- ☐ Purchase new home (new development)
- ☐ Refinancing mortgage
- ☐ Taking out second mortgage
- ☐ Other, ...

How do you rate your financial knowledge?

- ☐ Very low
- ☐ Limited
- ☐ Good
- ☐ Very good

Have you previously taken out a mortgage?

- ☐ Yes
- ☐ No

Do you have experience with taking out other financial products?

- ☐ Term life insurance
- ☐ Pension / annuity
- ☐ Investment insurance
- ☐ Other, ...

Do you know what your income will be when you or your partner retire?

- ☐ No
- ☐ Approximately
- ☐ Yes

Do you know what your income will be in case of unemployment of you or your partner?

- ☐ No
- ☐ Approximately
- ☐ Yes

Do you know what your income will become if you or your partner become incapacitated?

- ☐ No
- ☐ Approximately
- ☐ Yes

Are you saving?

- ☐ Yes
- ☐ No

SPACE FOR COMMENT / EXPLANATION / WISHES: