

Mortgage Process and Contact History for Peter & June Avery

Current Address	New Mortgage Address	Lender	Product	Solicitors	Estate Agent
101 The Avenue Merryoaks Durham Co Durham DH1 1QQ	117 Bradman Court Riverside Chester-Le-Street Co Durham DH1 2WQ	Newcastle Building Society Jane Taylor 0191 4765432 Roll Number 26964	Discount Next Time Buyer 25 Year Term Mortgage Full Status	Hewitt Brown-Humes & Hare Margaret Hare 0191 38798	Robinsons Estate Agents Peter Robinson 0191 387642
Phone Home: 0191 345654					
Phone Work: 0191 354567					
Mobile: 07976 3287					

Peter & June Avery

IDD	KFI	Loan Size	Submitted	Valuation Date	Valuation	Offer Date	Offer Expiry	Exchange	Completion	Proc Fee Paid	Penalty Expiry
04-Jan-07	04-Jan-07	£80,000	08-Jan-07	19-Jan-07	£120,000	10-Feb-07	10-May-07	13-Mar-07	22-Mar-07	29-Apr-07	23-Mar-09

Contact Date	By	Method	Notes
01/04/07 16:45	DF	V	Visited clients new home. Q'aire completed with 2 referrals.
26/03/07 14:00	DF	L	Feedback q'aire sent to client.
23/03/07 15:45	DF	L	Welcome to your new home card sent.
23/03/07 14:30	DF	T	Solicitor confirms mortgage completion today.
15/03/07 10:00	DF	T	Endowment increase now in force.
12/03/07 12:10	DF	T	Buildings and Contents placed on risk from tomorrow as exchange of contracts expected.
28/02/07 11:45	DF	T	Solicitor targets completion date of 23rd March as searches etc are completed
10/02/07 11:50	DF	T	Advised solicitor to proceed with searches etc.
10/02/07 11:00	DF	T	Called Pete and told him the offer letter had been received and all details were correct. Solicitor should have a copy and can get on with searches etc. Pete asked me to call the solicitor and put the wheels in motion
10/02/07 10:00	DF	L	Offer letter letter received - all in order.
26/01/07 14:10	DF	T	Lender confirmed valuation OK. No problems identified or retentions.

13 March 2008

Adviser: **David Foggerty**

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Administrator: **Jane West**

Peter & June Avery

Contact Date	By	Method	Notes
12/01/07 11:25	DF	T	Lender scored application. Everything OK. Valuer instructed.
08/01/07			Previewed letter: Application Submitted
04/01/07 14:05	DF	V	Application completed. Arrangement fee and valuation fee paid.

Client Additional Notes:

Product stepped discount for 3 yrs.
Penalty: £100 plus 5% first 2 yrs then 4% for 1 yr.

Referred to:
Edward Carr first time buyer and daughter Deborah getting married.