

Needs Assessment Questionnaire

To ensure an accurate needs assessment, please complete this form as comprehensively as possible

Personal Details

Full Name Title (Mr/Mrs/Ms/Miss/Dr/Professor/Other)

Marital Status Nationality

Date of birth Current Address

Time at current address Years Months

Tel: Home Are you a UAE Resident? Yes No Length of residency years

Tel: Work E-mail address

Mobile Alternate e-mail

Will there be a co-applicant? Yes No If "Yes", what is your relation to the co-applicant?

Property Details

Project/building name Villa Apartment

Developer Is the property completed?: Yes No

Located in Dubai: Yes No If 'No', in which Emirate

Will the property be your main residence? Yes No If 'No', please specify the purpose (e.g. holiday home)

How are you buying the property? Directly from the developer Directly from an individual Through a real estate agency

Do you need help to find the right property? Yes No

Existing Liabilities (e.g. Other mortgages/car & personal loans - please list all)

Type of loan	<input type="text"/>	Bank	<input type="text"/>	Outstanding amount	<input type="text"/>	Installment	<input type="text"/>
Type of loan	<input type="text"/>	Bank	<input type="text"/>	Outstanding amount	<input type="text"/>	Installment	<input type="text"/>
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Mortgage Needs

Purchase Price Loan amount required Loan % required

Deposit available Term required years Joint Sole application

Other Financial Services & Considerations

- Would you like to discuss your **Mortgage Life Insurance** options? Yes No *(Protecting the future of loved ones is crucial as loans still have to be paid in the event of death or serious illness.)*
- Would you like to discuss **Building Insurance** options? Yes No *(Insurance taken out by the owner of the property to insure the property against risks such as fire, landslide etc.)*
- Would you consider a **localised Will** acceptable in the UAE? Yes No *(To mitigate possible inheritance issues that may arise in this jurisdiction - secure the ones you love; it's never too early but often too late!)*
- Do you need **Legal Assistance** to help with transfer of ownership? Yes No *(A qualified & licensed property lawyer will ensure all the critical steps are taken to successfully transfer & register the property into your name)*
- Are you interested in **Executive Coaching** session? Yes No *(A Coach can help you discover/reassess your financial goals and the smartest way to achieve them)*

Employment/Financial status

- Salaried Self-employed (shareholding more than 20%) Other
- Who do Bank with? (salary account) Are you willing to transfer your salary? Yes No
- Do you have a credit card Yes No With which bank(s)? Please list all + limits

Salaried applicants only

- Name of employer Industry/Nature of business
- Occupation/Job Title Length of employment Years Months
- If less than 6 months, has probation been successfully completed: Y/N If less than 2 years, previous history:
- Annual salary Rental allowance Bonus last year

Self-employed applicants only

- Name of company Nature of business
- What is your shareholding? % Length of time in business Years Audited financials available? (at least 2 years) Yes No
- Company performance:**
- Net profit:** Year 1 Year 2 Year 3
- If applicable, as Director of the company, please state your income as follows:**
- Salary:** Year 1 Year 2 Year 3

Before signing this document, please verify that the content you are signing for is correct.

Thank you for choosing Mortgage Finders Dubai!

Your signature _____

Date _____