

PURCHASE INSTRUCTION FORM

Section 1 | Buyer details

About this form

Use this form to provide the initial information needed for a proposed purchase. Completing or returning it does not itself create a retainer or confirm that the firm can act.

Buyer 1 – full legal name	Previous names (if any)
Date of birth (DD/MM/YYYY)	Email
Telephone	National Insurance no. (only if required/approved)
Current residential address	

Buyer 2 – full legal name	Previous names (if any)
Date of birth (DD/MM/YYYY)	Email
Telephone	Current residential address

Additional buyer(s) – provide details on a separate sheet

DRAFT FOR INTERNAL COMPLIANCE APPROVAL

PURCHASE INSTRUCTION FORM

Section 2 | Property and transaction

Property details

Property address

Purchase price (£)

Offer accepted date

Preferred completion date

Tenure (if known)

Freehold

Leasehold

Other / unknown

Estate agent and branch

Agent contact name

Agent email

Agent telephone

Your circumstances

Buyer status

First-time buyer

Home mover

Investor / additional property

Is the purchase dependent on another transaction?

Yes

No

Related sale address (if applicable)

Known chain details or important dates

DRAFT FOR INTERNAL COMPLIANCE APPROVAL

PURCHASE INSTRUCTION FORM

Section 3 | Funding and source of funds

How will the purchase be funded?

Provide an estimated breakdown. The legal team may request separate supporting evidence and further information after reviewing the transaction.

Mortgage amount (£)	Personal savings (£)
Gifted funds (£)	Inheritance (£)
Sale proceeds (£)	Investment / asset-sale proceeds (£)
Business income / dividends (£)	Other funds (£)
Estimated total funds (£)	Reservation or deposit already paid (£)

Briefly explain how the deposit and purchase monies have been accumulated

Will any funds come from outside the UK?

Yes No

If yes, country, currency and how the funds were accumulated

DRAFT FOR INTERNAL COMPLIANCE APPROVAL

PURCHASE INSTRUCTION FORM

Section 4 | Gift donor details - Donor 1

Gifted deposit or purchase funds

Complete this section for the first person providing a gift. If there is no gifted contribution, leave this section blank.

Full legal name Relationship to buyer(s)

Date of birth (DD/MM/YYYY) Email

Telephone Gift amount (£)

Current residential address

How did the donor accumulate the gifted funds?

Donor solicitor, if separately represented (if known)

Additional information about the gift

DRAFT FOR INTERNAL COMPLIANCE APPROVAL

PURCHASE INSTRUCTION FORM

Section 4 | Gift donor details - Donor 2

Additional gift donor

Complete this section if a second person is providing a gift. For any additional donors, provide the same details on a separate sheet.

Full legal name

Relationship to buyer(s)

Date of birth (DD/MM/YYYY)

Email

Telephone

Gift amount (£)

Current residential address

How did the donor accumulate the gifted funds?

Donor solicitor, if separately represented (if known)

Additional information about the gift

DRAFT FOR INTERNAL COMPLIANCE APPROVAL

PURCHASE INSTRUCTION FORM

Section 5 | Mortgage, ownership and use

Mortgage arrangements

Will there be a mortgage?

Yes

No

Application in progress

Lender

Mortgage broker / adviser

Broker email

Broker telephone

Ownership intentions

How many legal owners will there be?

One

Two

More than two

If buying jointly, proposed ownership (if known)

Joint tenants

Tenants in common

Advice required

If tenants in common, proposed shares or arrangement

Intended use of the property

Main home

Second home

Buy to let

Other

Full names of anyone aged 17 or over who will live at the property but will not be an owner

Trust, declaration of trust, restriction or other ownership requirements

DRAFT FOR INTERNAL COMPLIANCE APPROVAL

PURCHASE INSTRUCTION FORM

Section 6 | Additional information and confirmation

Additional information

If leasehold: known service charge, ground rent, managing agent or planned works

Accessibility needs, communication preferences or other requirements

Anything else that may be relevant to the proposed purchase

Confirmation

To the best of my/our knowledge, the information provided in this form is complete and accurate. I/we understand that further information and evidence may be requested and that completing this form does not itself confirm that the firm can act.

Buyer 1 signature

Date

Buyer 2 signature

Date

Preferred contact method and best time to contact you

DRAFT FOR INTERNAL COMPLIANCE APPROVAL