

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.