

# FACT FIND FORM

M<sup>c</sup>Cambridge Duffy provide free debt advice and counselling.

We offer a range of Debt Solutions to help you get on the right track and out of debt.

For us to determine the most appropriate solution for your individual circumstances, simply follow the 3 easy steps below.

All advice is free and confidential. If you do not wish to proceed with any of our solutions, we will return any documentation you have sent.

## 3 simple steps

### Step 1 : Fill in

Fill in the form providing as much information as possible. If you are unsure about anything or want to chat to an advisor call 0800 043 3328.

### Step 2 : Return

Return this form via post to M<sup>c</sup>Cambridge Duffy,  
Templemore Business Park, Northland Road, Derry, BT48 0LD  
or email it to [enquiry@mccambridgeduffy.co.uk](mailto:enquiry@mccambridgeduffy.co.uk)

### Step 3 : Discuss

As soon as we receive your fact find form, we will review your information, then contact you to discuss your best solution.



## ABOUT YOU

Fill in the fields that are relevant to your situation.

	You	Your Partner
Title (Mr / Mrs / Miss / Other)		
First name(s)		
Surname		
Date of birth		
Residential address (tick) <input type="checkbox"/> Homeowner <input type="checkbox"/> Tenant		
Marital status		
Age of dependents (if any)		
Best contact number		
Alternative contact number		
Email address		
Best time to contact		
No. of people in household		

## ACCOMMODATION

Fill in the relevant information about your living circumstances below.

### RENTED ACCOMMODATION SECTION (FOR TENANTS)

Monthly rent amount (£)	
Are you in rent arrears? (tick) <input type="checkbox"/> Yes <input type="checkbox"/> No	Amount (£)
Name on contract (Mr / Mrs / Miss / Joint)	

### MORTGAGE SECTION (FOR HOMEOWNERS)

Name on agreement (Mr / Mrs / Miss / Joint)	
Current value (£)	
Mortgage outstanding (£)	
Are you in mortgage arrears? (tick) <input type="checkbox"/> Yes <input type="checkbox"/> No	Amount (£)
Any penalties for an early settlement? (tick) <input type="checkbox"/> Yes <input type="checkbox"/> No	Amount (£)
Secured loan / Second mortgage (tick) <input type="checkbox"/> Yes <input type="checkbox"/> No	Amount (£)

Need help with filling in your fact find form?



freephone 0800 043 3328  
landline 028 7137 6888



[www.mccambridgeduffy.co.uk](http://www.mccambridgeduffy.co.uk)

# FACT FIND FORM

## YOUR EMPLOYMENT

If you are employed by a business, please fill out SECTION A.  
If you are self employed, please fill out SECTION B.

### SECTION A - EMPLOYER DETAILS

Employer name

Job title

Are you a director of a limited company? ☐ Yes ☐ No

### SECTION B - SELF EMPLOYED DETAILS

How long have you been self employed?

What is the nature of your work?

What is the name of your business?

### SECTION B (continued) - SELF EMPLOYED DETAILS

Do you have business premises? ☐ Yes ☐ No

If you have business premises what is the address?

What is your annual turnover? (£)

What profit did your business make in the last year? (£)

How much do you draw from the business? (£)

What were your total drawings in the last 12 months? (£)

Are you a SOLE TRADER / PARTNER ? (delete as appropriate)

Have you completed all necessary Self Assessment Returns? ☐ Yes ☐ No

## MONTHLY INCOME DETAILS

Fill in the fields that are relevant to you on a monthly basis.

	You (£)	Your Partner (£)
Basic take home pay	<input type="text"/>	<input type="text"/>
Overtime	<input type="text"/>	<input type="text"/>
Bonuses	<input type="text"/>	<input type="text"/>
Part-time work take home pay	<input type="text"/>	<input type="text"/>
(£)		(£)
Child benefit	<input type="text"/>	Income support <input type="text"/>
Child tax credit	<input type="text"/>	Income from pension <input type="text"/>
Working tax credit	<input type="text"/>	Income from rental property <input type="text"/>
Jobseekers allowance	<input type="text"/>	Child maintenance <input type="text"/>
Disability living allowance	<input type="text"/>	Other <input type="text"/>
Housing benefit	<input type="text"/>	Other <input type="text"/>

## MONTHLY LIVING EXPENSES

Fill in the fields that are relevant to you on a monthly basis.

	(£)	(£)
1 <sup>st</sup> Mortgage	<input type="text"/>	Satellite TV / Cable <input type="text"/>
2 <sup>nd</sup> Mortgage/Secured Loan	<input type="text"/>	Clothing <input type="text"/>
Endowment policy	<input type="text"/>	School travel <input type="text"/>
Rent	<input type="text"/>	School uniforms <input type="text"/>
Ground rent	<input type="text"/>	After school activities <input type="text"/>
Arrears	<input type="text"/>	School meals <input type="text"/>
Council tax / Rates (NI)	<input type="text"/>	Child maintenance <input type="text"/>
Home insurance	<input type="text"/>	Child minding <input type="text"/>
Life / Health insurance	<input type="text"/>	Medical expenses <input type="text"/>
Food and toiletries	<input type="text"/>	Pets <input type="text"/>
Gas	<input type="text"/>	HP / Lease <input type="text"/>
Electricity	<input type="text"/>	Vehicle HP / Lease <input type="text"/>
Other Fuel	<input type="text"/>	Car petrol <input type="text"/>
Water Rates	<input type="text"/>	Car insurance <input type="text"/>
Telephone	<input type="text"/>	Car road tax <input type="text"/>
Mobile phone	<input type="text"/>	Car maintenance <input type="text"/>
Internet	<input type="text"/>	Public transport <input type="text"/>
TV license	<input type="text"/>	Miscellaneous <input type="text"/>

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**McCAMBRIDGE DUFFY**



If you run out of space, please attach an extra sheet listing any additional creditors.

**McCAMBRIDGE DUFFY**  
INSOLVENCY PRACTITIONERS

# FACT FIND FORM

## TRANSPORT

If you own any vehicles, please provide the following information.

DO YOU HAVE ONE OR MORE CARS?

☐ Yes

☐ No

### VEHICLE 1

Year of registration

Make / Model

HIRE PURCHASE?

☐ Yes

☐ No

Finance company

Agreement start date

Monthly payments (£)

Amount paid (£)

Any arrears? How much (£)

Length of term

Hire purchase completion date

### VEHICLE 2

Year of registration

Make / Model

HIRE PURCHASE?

☐ Yes

☐ No

Finance company

Agreement start date

Monthly payments (£)

Amount paid (£)

Any arrears? How much (£)

Length of term

Hire purchase completion date

## BACKGROUND STORY

Please include a brief summary of how your debt accumulated and anything you feel may help explain your current situation.  
i.e. change in circumstances, cost of living, events, jobs, health etc...

## What now?

Now you can proceed to **Step 2**.

Send in your fact find form, with any enclosed documents to email : [enquiry@mccambridgeduffy.co.uk](mailto:enquiry@mccambridgeduffy.co.uk)

or post : McCambridge Duffy, Templemore Business Park, Northland Road, Derry, BT48 OLD and one of our advisors will be in touch.

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