



How did you find de Kredietier?

Personal situation

Client

☐ Male ☐ Female

Surname

First name & initials

Date of birth

Phone number(s)

E-mail address

(Partner)

☐ Male ☐ Female

Surname

First name & initials

Date of birth

Phone Number(s)

E-mail address

Current address

Street + house number

Zip code, City/town

Country

Civil status

- ☐ Single
- ☐ Partner (without cohabitation agreement)
- ☐ Partner (with cohabitation agreement)
- ☐ Married in community of property
- ☐ Married on a prenuptial agreement
- ☐ Married in limited community of property

Do you have children? ☐ Yes ☐ No

If yes, please provide name and date of birth

1.		
2.		
3.		
4.		
5.		



Financial situation

	Client	Partner
Employer		
Job title		
Employed since		

Employment contract	☐ Permanent	☐ Temp., until
(Employment contract partner)	☐ Permanent	☐ Temp., until

	Client	Partner
Income (yearly)	Gross inc. vacation pay	€
	Variable	€
	Fixed thirteenth month	€
	End-of-year bonus	€
	30% ruling?	
	If yes, until	

What are your income expectations?

- ☐ Stays the same
☐ Increases % per year

What are your partner's income expectations?

- ☐ Stays the same
☐ Increases % per year

Expecting to work less?

- ☐ Stays the same
☐ Yes, from age

Does your partner expect to work more/less?

- ☐ Stays the same
☐ Yes, from age

Do you have life insurance?

With which company?

Client

☐ Yes ☐ No

Partner

☐ Yes ☐ No

Do you have disability insurance?

With which company?

☐ Yes ☐ No

☐ Yes ☐ No

Do you have a pension plan?

With which company?

☐ Yes ☐ No

☐ Yes ☐ No

Do you have property and casualty insurance?

With which company?

☐ Yes ☐ No

☐ Yes ☐ No

Do you have your own business?

Since when?

Client

☐ B.V. ☐ V.O.F. ☐ Maatschap ☐ Eenmanszaak ☐ n/a

(Partner)

☐ B.V. ☐ V.O.F. ☐ Maatschap ☐ Eenmanszaak ☐ n/a

Please fill in these fields

Resultaat per jaar

Result 2024

Client

€

Partner

€

Result 2023

€

€

Result 2022

€

€



Property

Current situation

Rent

Costs: €

Own home

Costs: €

If applicable, current mortgage

Can you provide an overview of your current mortgage with the loan portions and interest rate listed?

When did you buy the property? (transfer date)

What is the value of the property?

Is the entire loan tax deductible?

Is this the first house you bought?

What is the original mortgage amount?

New property

Where do you want to buy?

In what price range are you looking?

Do you have a buying agent? If yes, who?

How much do you want to spend p.m. on living expenses?

Financial overview

Own funds

Savings

€

Shares

€

Real estate

€

Other,

€

Loans/debts

Personal loans

€

Redemption facility

€

Credit card

€

Mortgage

€

Alimony

€

Other,

€

Are you expecting an inheritance or a gift?

☐ Yes

☐ No



de Kredieteer®
HYPOTHEKEN & FINANCIËLE PLANNING

Additional notes

