

Mortgage Document Checklist

When you speak to one of our advisers you will be asked to gather documents ready for an application and it's worth being prepared beforehand.

Needed for all Clients Applying

Proof of Identity and Address

- ☐ Passport **Or** Driving license
- ☐ Bank statement showing address **Or** Utility bill **Or** Council tax bill **Or** Home phone bill
(Max 3 months old)

Proof of Income

Employed Clients

- ☐ Latest 3 months Payslips

Self-employed - Sole Trader Clients

- ☐ Latest 3 years Tax Calculation **Or** SA302's
- ☐ Latest 3 years Tax Overviews

Self-employed – Ltd Company **Or** Partnerships Clients

- ☐ Latest 3 years Accounts
- ☐ Latest 3 years Tax Calculation **Or** SA302's
- ☐ Latest 3 years Tax Overviews

Outgoings

- ☐ All Single & Joint Bank Account Statements Latest full 3mths showing name & address
(Online statements are acceptable)
- ☐ Latest Credit Card Statement
- ☐ Loan details = start date, end date, balance & account number
- ☐ Latest Annual Mortgage Statement & account number

Savings

- ☐ Latest 1 mth savings bank statement showing name & address **Or** Gifted deposit form with accompanied ID, Address & savings proof for the giftor.