

MORTGAGE APPLICATION SUBMISSION CHECKLIST FOR INTERMEDIARY USE ONLY

ALL DOCUMENTS MUST BE ORIGINAL AND IF NOT SUBMITTED WITH THE APPLICATION WILL CAUSE DELAYS.

ITEM	1 st APPLICANT	2 nd APPLICANT	ALL APPLICANTS
BANK STATEMENTS			
For each applicant holding a sole named account – for each account held, covering the latest 3 month period			
For applicants with a jointly named account - for each account held, covering latest 3 month period			
PROOF OF DEPOSIT			
Bank/building society statements			
Gifted Deposit evidence (bank/building society statement(s) showing funds in name of donor)			
Name & address of provider of gifted deposit			
EMPLOYED INCOME			
Latest Year P60 (or previous tax year & most recent month 12 pay slip)			
Salary/wage slips for last 3 months (monthly/weekly)			
CONTRACT WORKER			
Current contract			
Previous contract(s)			
SELF EMPLOYED INCOME			
Sole trader/partnership – latest 3 years accounts (profit & loss account and balance sheet)			
Shareholder in Ltd Company (or Director/senior employee) – latest 3 years accounts (latest <6 months since last year end)			
CURRENT RETIREMENT INCOME (where retired)			
Most recent confirmation(s) of payment level (dated <12 months ago)			
Evidence of spouse's payment (occurring on death of payment recipient)			
FORECAST RETIREMENT INCOME (where mortgage term is beyond the earlier of expected retirement age or age 70)			
State Pension Forecast (dated <24 months ago)			
Final Salary Scheme - most recent forecast (dated <12 months ago)			
Personal Pension Scheme – current value & most recent forecast (dated <3 months ago)			
FOR AN INTEREST ONLY MORTGAGE (if applicable)			
Endowment Policy, Personal Equity Plan - most recent statement/forecast			

Stocks and Shares ISA, Cash ISA, Unit/Investment Trust Plan – statement showing current value & contributions in last 6 months			
Pension Lump Sum – statement of current value and recent forecast			
BUY TO LET PORTFOLIO (where applicable)			
Schedule of all properties owned showing: property address, mortgage value, monthly mortgage payment, rental income			
LET TO BUY (where existing property to be rented out)			
Letter from ARLA member confirming estimated rental			
Consent to Let confirmation letter issued by existing lender			
Copy of Mortgage Offer (where existing property being remortgaged)			
REMORTGAGE			
Remortgage Transfer Instruction letter			
OTHER IMPORTANT DOCUMENTS			

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