

Client(s) Name(s): _____

Documents required for Mortgage Application

Tick List

Applicants
1st 2nd

For ALL applicants

Fiscal Number (Portuguese Tax Number) advise lawyers to apply **NOW**

Passport (Clear Copy)

Bank Statements (Last 3 Months) **Current** (where we can see all the fixed monthly expenses being paid)

Bank Statements (Last Month) **Savings Account** (to help reinforce application)

Mortgage Statement(s) Last Month - with remaining capital, mortgage term and monthly payment (if applicable)

Credit Report from either **www.experian.co.uk** or **www.equifax.co.uk** (living in UK) **www.experian.ie** (living in Ireland)

(UK property Value) **www1.landregistry.gov.uk** proves you are the owner and the commercial value of the property (if applicable)

Utility Bill (Dated within Last Month) Proves address

Other Income (if applicable)

Confirmation of Pension received for the last 3 months

Confirmation of Rent received - Copy of tenancy agreement plus;

Copy of latest tax return;

Copy of bank statements showing rent payments;

Liabilities (if applicable)

Details of personal loans(principal due, monthly instalments)

Copy of tenancy agreement

Maintenance / Alimony / Benefits (Children, Social Security etc)

If EMPLOYED

P60 copy of last years tax return

Payslips (last 3 months)

Letter from employer stating job position, length of service, & gross annual income

If Self Employed or Company Owner

Copies of last year company profit/loss accounts signed by a certified accountant

Self assessment tax return (full copy)

Business Bank Statements (Last 3 months)

Statement of Savings, Assets, etc.

If Retired

Statement of pension income

Payment advices from the last three months

Annual income Tax form (last year)
