

# Mortgage appointment checklist

There are lots of documents and information needed when you're making a mortgage application.

The more documents you can bring to your initial mortgage appointment, the quicker we'll be able to process your mortgage application - but don't worry if you're not able to find every document.

## What to bring to your first appointment

### PROOF OF IDENTITY

- Form of identity (eg. passport or driving licence)

### PROOF OF INCOME

- Employers' details for the last 3 years (name, address, telephone number and dates you were employed there)
- 13 weeks' or 3 months' payslips
- Latest P60 (usually issued by your employer in April/May)
- Last 2 years' copies of SA302s/audited accounts (if self-employed)
- Bank statements (latest 3 months)
- Your latest annual mortgage statement
- Details of existing outgoings including details of other loan commitments

### PROOF OF ADDRESS

- Your full address history (to cover at least the last 3 years)
- Proof of residency (eg. utility bill or bank statement, dated in last 3 months)

### ADDITIONAL INFORMATION

- Proof of deposit
- Details of all existing personal and mortgage related insurance
- Employment benefits (eg. sick pay, pensions)
- New property details

Please make sure you bring original documents with you.