

Independent Mortgage Advisor Declaration Form for a Cash Purchaser(s)

Housebuilder			
Plot number		Development name	
Primary Purchaser		Secondary Purchaser	
Full names <i>(including any middle names)</i>			
Email address			
Date of birth (DD/MM/YYYY)			
Current Address			
Time at this address (MM/YY)			
Has the purchaser(s) lived here for more than 3 years? If no, please state previous addresses below	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Previous address			
Time at this address (MM/YY)			
Previous Address			
Time at this address (MM/YY)			
Current living situation	<input type="checkbox"/> Renting <input type="checkbox"/> Living with friends or family <input type="checkbox"/> Own a property	<input type="checkbox"/> Renting <input type="checkbox"/> Living with friends or family <input type="checkbox"/> Own a property	
Are they a First Time Buyer?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	
I can confirm that I have checked the following documentation in relation to the above purchase and with all information reflected in the attached calculator:			
Proof of all income	<input type="checkbox"/> If Employed - 3 months of payslips etc <input type="checkbox"/> If Self-Employed – 2 years' trading history or 2 Years' SA302 <i>(please supply the documents evidence self-employed income with this declaration form)</i> <input type="checkbox"/> If Other - Proof of Pension etc	<input type="checkbox"/> If Employed - 3 months of payslips etc <input type="checkbox"/> If Self-Employed – 2 years' trading history or 2 Years' SA302 <i>(please supply the documents evidence self-employed income with this declaration form)</i> <input type="checkbox"/> If Other - Proof of Pension etc	
3 months bank statements	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	
Proof of ID	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	
Proof of current address	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	
Proof of deposit funds <i>(letter confirming gift, if applicable)</i>	<input type="checkbox"/> Yes	<input type="checkbox"/> Yes	
Total funds from the purchaser			

Additional Information		
	Primary Purchaser	Secondary Purchaser
Please provide details of where the purchase funds are being obtained from?	<input type="checkbox"/> Relationship breakdown <input type="checkbox"/> Savings <input type="checkbox"/> Pension <input type="checkbox"/> Related sale <input type="checkbox"/> Probate/Inheritance <input type="checkbox"/> Other	<input type="checkbox"/> Relationship breakdown <input type="checkbox"/> Savings <input type="checkbox"/> Pension <input type="checkbox"/> Related sale <input type="checkbox"/> Probate/Inheritance <input type="checkbox"/> Other
Please provide more information on the details of where the purchaser(s) funds are being obtained from		
Why is if the purchaser(s) not obtaining a mortgage to buy a larger share/the property outright?	<input type="checkbox"/> Age <input type="checkbox"/> Income <input type="checkbox"/> Credit history <input type="checkbox"/> Other	<input type="checkbox"/> Age <input type="checkbox"/> Income <input type="checkbox"/> Credit history <input type="checkbox"/> Other
Please provide more information on the details of why the purchaser(s) are not purchasing a larger share or the property outright?		
Broker Declaration		
I can confirm that the above-named purchaser(s) meet the qualifying criteria listed below: <input type="checkbox"/> Is unable to purchase/afford the full value of the property, is purchasing a share that they can afford and able to sustain in the future and has been encouraged to maximise their share		
Name		
Company		
Title		
FA Registration Number		
Broker Reference Number		
Contact Number		
Email		
Signature		
Date		