

Independent Mortgage Advisor Declaration Form for a Mortgage 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		
Please provide details of where the deposit 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

Additional Information

The calculator allows users to apply flexibility to the share purchased. Please note the purchasers are required to maximise the share that they purchase. If for any reason the lower caps are breached (the upper caps cannot be), you must provide details below on why this purchase should be considered as exception case.

Full details for the Homes England calculator including guidance notes can be found at:
<https://www.gov.uk/guidance/capital-funding-guide/1-help-to-buy-shared-ownership>

<p>Purchaser(s) income multiple (gross household income) is not between 2.5 and 4.5.</p> <p>If not, please confirm the reasons:</p>	
<p>Purchaser(s) monthly payments to net household income ratio is not between 25% and 45%</p> <p>If not, please confirm the reasons:</p>	
<p>Further comments:</p>	

Broker Declaration

I can confirm that the above-named purchaser(s) meet the qualifying criteria listed below:

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	