



Mortgage

Document Checklist

- **Complete Application Form**
- You or the prospect to fill out the application form in as much detail as possible.
- **The Fact Find Sheet** *will complement the application and any additional information gathered on the FF call should go on here. Any information can be useful, including clients' personal info, holidays, trips planned, children's birthdays, etc. The detail is what will help you build a great relationship, include this in the fact find sheet, and then when you follow up, you can mention these details and it shows you care.*
- **Comparables:** *For similar proposed properties, an estate agent's report, not mandatory but nice to have.*
- **Current Valuation:** *Doesn't matter too much about the age, as it will give us a good indication of the value of the property. If they don't have one, some sort of supporting information for the proposed property valuation can be helpful. A home report can also be useful or marketing material if a sale.*
- **Other supporting info:** *This can of course vary from case to case, but we'll take whatever they want to give us, the more the better.*
- **Asset & Liability Statement:** *This is a document that should have been filled out by the client, covering personal and company assets and liabilities.*