

Required Documents



A checklist for your Shared Ownership Reservation

The documents on the checklist below may be required to process your reservation. Please note that the original documents may also be required.

Proof of identity

- ☐ Valid passport or driving license.

In order to prove your residency

- ☐ Proof of current address e.g. a utility bill. This must be dated within the last 3 months.

Additional proof of residency for Non UK and EEA Nationals

- ☐ Valid visa e.g. Residence Permit or visa stamp in valid passport.

If you are employed

- ☐ Latest three month's payslips
- ☐ P60
- ☐ Copy of contract if starting a new position.

If you are self-employed

- ☐ Latest 2 years SA302's with corresponding Tax Year overview, or
- ☐ Latest 2 years tax calculations with corresponding Tax Year Overview, or
- ☐ Latest 2 years trading accounts.

If self-employed for less than 2 years, please provide the above for the years that you have been trading.

To help assess your income and affordability

- ☐ 3 months consecutive bank statements for all of your accounts to evidence salary credits and financial commitments.
- ☐ Latest Credit Report

In order to prove your source of deposit

- ☐ Personal Savings (6 months bank statements are required)
- ☐ Gift Donor Letter (Template will be provided) / Gift Donor ID / Gift Donor Proof of Savings (6 months bank statements are required) / Gift Donor Proof of Transfer
- ☐ Gift Recipient Proof of Transfer In (3 month bank statements)

A link will be provided to upload your docs securely onto our portal following a passed assessment. If you don't have access please contact 0114 2701444

Failure to supply this information to your Adviser will delay your Reservation and/or the submission and processing of your mortgage application.

Your home may be repossessed if you do not keep up repayments on your mortgage.

There may be a fee for mortgage advice of up to 1% of the amount borrowed. A typical fee is £499 but this will depend upon your circumstances.