

Submission Guide

Documentation required

For any queries you have on submitting a case to us, please contact our [Sales Team](#).



Product Tier	Buy to let mortgages					Residential mortgages	
	Portfolio		Non portfolio			Residential	Help to Buy
	1	2-3	1	2-3	FTB	All tiers	All tiers
Standard Declaration (signed and dated)	✓	✓	✓	✓	✓	✓	✓
Direct debit mandate	✓	✓	✓	✓	✓	✓	✓
Existing property portfolio form	✓	✓					
Combined business plan, cash flow, and assets and liabilities form, along with latest month's bank statement evidencing rent and mortgage payments	✓	✓					
Latest years accounts/tax calculation accompanied with corresponding tax year overview (self employed)	On Underwriter Request				✓	✓	✓
Latest consecutive 3 months payslips & P60 (employed)	On Underwriter Request				✓	✓	✓
The latest three calendar months' personal bank statements showing income and expenditure		On Underwriter Request		On Underwriter Request	✓	✓	✓

Possible additional documents

You may need to provide additional documents in the following scenarios;

Scenario	Document required
If no active mortgage is found on the credit file	Latest annual mortgage statement and/or bank statements
If the applicant is not on the voters roll	Proof of address
If the electronic ID check has not passed	Proof of ID
Gifted deposit	Gifted declaration form
Where an element of the residential loan is interest only	Evidence of the repayment vehicle

Please note where an application is for a limited company all directors and shareholders should all be party to the application

Correct as at: 04.03.2022

FOR INTERMEDIARIES ONLY

The products and/or services featured in this communication are not regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Precise Mortgages is a trading name of Charter Court Financial Services Limited which is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register Firm Reference Number 494549). Registered in England and Wales with company number 06749498. Registered office: 2 Charter Court, Broadlands, Wolverhampton WV10 6TD.

04-PM-G-28 (3)