

Application Form

Personal statement of assets and liabilities

octopus real estate

A brighter way

Please complete one form per Borrower. If assets are in the name of a Company or Trust, please advise details. Additional sheets can be found on www.octopusproperty.com/resources

Please note if you send a separate assets and liabilities form it must be signed and dated.

Additional Detail

Introducer name

Borrower name

Security address

Income details (gross per annum)

Salary £

Other annual income (eg pensions, annuities) £

Bonus £

Rental Income £

Dividends/Investments £

Other (Interest Income etc) £

TOTAL £

Income details (gross per annum)

| Full address | Your share of the property (%) | Estimated value £ | Outstanding mortgage amount £ | Total net asset value £ | Monthly rental income £ | Monthly mortgage costs £ | Lender |
|--------------|--------------------------------|-------------------|-------------------------------|-------------------------|-------------------------|--------------------------|--------|
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If you have any questions please get in touch on **0800 294 6850** or at sales@octopus-realestate.com

| Assets/investments/quoted shares/bonds/mutual funds | | |
|---------------------------------------------------------|------------------|--------------------|
| Company name | Number of shares | Value |
| | | £ |
| | | £ |
| | | £ |
| | | £ |
| Cash/savings | | |
| Bank | Value | |
| | £ | |
| | £ | |
| | £ | |
| | £ | |
| Liabilities – e.g credit cards, loans, car finance etc. | | |
| Lender | Purpose | Amount outstanding |
| | | £ |
| | | £ |
| | | £ |
| | | £ |
| Any current personal guarantees | | |
| Lender | Amount | |
| | £ | |
| | £ | |
| | £ | |
| | £ | |

| Shareholding(s) in any companies | | |
|--------------------------------------------------------------------------------------------------------------|------------------|-------|
| Company name | % ownership | Value |
| | % | £ |
| | % | £ |
| | % | £ |
| | % | £ |
| Other assets – e.g vehicles/valuables/collections | | |
| Description | Value | |
| | £ | |
| | £ | |
| | £ | |
| | £ | |
| Company tax liabilities – (only complete if you are a shareholder of a company) | | |
| Company name | Number of shares | Value |
| | % | £ |
| | % | £ |
| | % | £ |
| | % | £ |
| Other commitments/obligations e.g life insurance, medical/health, child support, education or school fees | | |
| Details | Amount | |
| | £ | |
| | £ | |
| | £ | |
| | £ | |

Number of Additional Information Forms added to the Application

Borrower

Borrower signature

Print name

Date (dd-mm-yyyy)

| |
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