

Porting mortgage application submission checklist

	Residential								
	Prime standard			Near prime			Shared ownership		
	E	S/E	C	E	S/E	C	E	S/E	C
E – Employed S/E – Self-employed C – Contractor									
Porting application and insurance declarations	✓	✓	✓	✓	✓	✓	✓	✓	✓
Direct Debit mandate	✓	✓	✓	✓	✓	✓	✓	✓	✓
Latest three months' payslips	✓			✓			✓		
Latest three years' accounts/SA302s		✓			✓			✓	
A copy of the latest and previous contract			✓			✓			✓
The latest three calendar months' personal bank statements showing income and expenditure	✓			✓			✓		
The latest three calendar months' personal and business bank statements showing income and expenditure		✓	✓		✓	✓		✓	✓
Memorandum of sale from the housing association							✓	✓	✓

Possible additional documents

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

Scenario	Document required
If the applicant is declaring any adverse credit	Documentary proof of satisfaction
If it's declared that a credit card is being repaid	Latest credit card statement