



# Declaration Lending into Retirement / Self-Employed Status

## Lending into Retirement

	Applicant 1	Applicant 2
<b>What is your planned retirement age?</b>	<input type="text"/>	<input type="text"/>
Will the term of your proposed mortgage take you beyond your planned retirement age?	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>If the term of your proposed mortgage will take you beyond your planned retirement age please confirm how you will continue to pay or redeem your mortgage beyond your retirement age by selecting one (or more) of the boxes below:</b>		
State Pension	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Private Pension	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Sale of Property	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Down Size	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Rent	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Live with Family	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Investment Fund	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Type of investment (ie ISA, Endowment, PEP, Bond)	<input type="text"/>	<input type="text"/>
Monthly payment?	£ <input type="text"/>	£ <input type="text"/>
Conversion to Lifetime Mortgage with another lender	Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>
Other (please specify)	<input type="text"/>	

## Self-Employed Persons

**Self-employed income** (self-employed, contract workers, or controlling directors\*)

As you are self-employed, Money Partners allows you to self certify your income. You should ensure that this product has been fully explained to you by the mortgage intermediary, is suitable for your circumstances, both now and in the future and that you are not borrowing more than you can afford to repay.

\* You own more than 25% of the voting rights of your business.

	Applicant 1	Applicant 2
Nature of business	<input type="text"/>	<input type="text"/>
Job title	<input type="text"/>	<input type="text"/>
Name and address of business	<input type="text"/>	<input type="text"/>
	Postcode	Postcode
Company Registration Number (where applicable)	<input type="text"/>	<input type="text"/>
Tel	<input type="text"/>	<input type="text"/>
Fax	<input type="text"/>	<input type="text"/>
How long trading	<input type="checkbox"/> yrs <input type="checkbox"/> mths	<input type="checkbox"/> yrs <input type="checkbox"/> mths
Name and address of accountant	<input type="text"/>	<input type="text"/>
	Postcode	Postcode
Tel	<input type="text"/>	<input type="text"/>
Fax	<input type="text"/>	<input type="text"/>

**Self-employed certification of income**

By signing this declaration, you are certifying that you understand your obligations and have sufficient income (as detailed below) to support your loan requested. Furthermore, you are confirming that the income stated is a true and accurate assessment of your total gross income, made up of a combination of salary, drawings, dividends and your share of the profits.

**Please state your reason for the self certification of your self-employed income by selecting one of the boxes below. You can provide further details on the reverse of this form should you need to do so.**

Earned income from more than one source       Proof of income not readily available       Seasonal work

Investment income       Completion Deadline       Other (please specify)

Applicant 1  £  Signature  Date

Applicant 2  £  Signature  Date