

Application Form

Personal statement of assets and liabilities

Please complete one form per Applicant. 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 details	
Introducer name	
Applicant name	
Company name (if applicable)	

Income details (gross per annum)	
Salary	£
Other annual income (eg pensions, annuities)	£
Bonus	£
Rental income	£
Dividends/investments	£
Other (interest income etc)	£
TOTAL	£

Property investments							
Full address	Your share of the property (%)	Estimated value £	Outstanding mortgage amount £	Total net asset value £	Monthly rental income £	Monthly mortgage costs £	Lender

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

Applicant signature

Print name

Date (dd-mm-yyyy)