



At the Chalk Face:

Packaging requirements – Personal Finance.

To help us underwrite your case as soon as possible, here are some of the key items we require:

1.  Fully completed application form, signed and dated.
2.  Full valuation or Hometrack report subject to criteria. Please view our [product plans](#) for our Hometrack criteria.
3.  Solicitors details to be completed in full on My Broker Venue and any information regarding the source of the deposit to be attached to the My Broker Venue checklist for purchase applications.



Full valuation or Hometrack report subject to criteria. Please view our [product plans](#) for our Hometrack criteria.



4. The mortgage illustration given to the customer must reflect the overall value of the loan including any associated fees e.g. valuation fee, broker fee and acceptance fee. Please also include full details of the introducer if applicable.



5. Up to date proof of income, and if affordability is assessed on the customers' stated expenditure please provide a fully completed affordability assessment form, to be signed and dated by all applicants.

Chalk Talk

Don't forget to view our videos on our [Chalk Talk page](#) where you'll find a further explanation on the above.

Congratulations!

You have a perfectly packaged case.
We'll be able to review it within 2 days.