

Mortgage request

Your data

Reference number

(to be completed by the Bank)

1. Personal information

Borrower 1

Company
Name
First name
Street / No.
Postcode / City
Telephone (during business hours)
Date of birth
Nationality
Civil status
Number of children
Profession / position
Name of employer
Gross income per year in CHF

Borrower 2

Company
Name
First name
Street / No.
Postcode / City
Telephone (during business hours)
Date of birth
Nationality
Civil status
Number of children
Profession / position
Name of employer
Gross income per year in CHF

2. Property information¹

<input type="checkbox"/> Single-family house / condominium (primary residence) Current estimated market value available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<input type="checkbox"/> Vacation house / condominium Current estimated market value available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<input type="checkbox"/> Building land Current estimated market value available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<input type="checkbox"/> Other _____ Current estimated market value available?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

¹ For properties located in Switzerland and persons domiciled in Switzerland only.

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3. Credit information

Property 1

Property type	
<input type="checkbox"/>	Purchase price financing
<input type="checkbox"/>	Building loan
<input type="checkbox"/>	Repayment of existing mortgage
Purchase price or investment costs	CHF
Additional incidental costs (e.g. renovation)	CHF
Total property costs	CHF
Desired mortgage	CHF
Possible repayments per annum	CHF
<input type="checkbox"/>	Direct repayment
<input type="checkbox"/>	Indirect repayment

Property 2

Property type	
<input type="checkbox"/>	Purchase price financing
<input type="checkbox"/>	Building loan
<input type="checkbox"/>	Repayment of existing mortgage
Purchase price or investment costs	CHF
Additional incidental costs (e.g. renovation)	CHF
Total property costs	CHF
Desired mortgage	CHF
Possible repayments per annum	CHF
<input type="checkbox"/>	Direct repayment
<input type="checkbox"/>	Indirect repayment

Summary of borrower's capital

Account balances, securities	CHF
Pension funds / pillar 2 account	CHF
Pillar 3 account	CHF
Life insurance policy	CHF
Third-party loan	CHF
Other _____	CHF
Total borrower's capital	CHF

Summary of borrower's capital

Account balances, securities	CHF
Pension funds / pillar 2 account	CHF
Pillar 3 account	CHF
Life insurance policy	CHF
Third-party loan	CHF
Other _____	CHF
Total borrower's capital	CHF

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Your checklist

4. Required documentation

For the property

Current market value estimate (no older than three years),

including the following documents:

- + Current abstract of title (any copy of purchase agreement / draft)
- + General site plan / cadastral survey / land register (lot, parcel)
- + Residential property blueprints / land blueprints / photos
- + Net floor space (square meters) / cubature (cubic meters)
- + Year of construction/restructurings/additions/renovations (designate year)
- + Building rights agreement (if property subject to building rights)
- + Current property insurance certification
- + Data on the region / community (location of the property)

Additional documentation

For repayment of bank loans

Copy of existing loan agreement

For building projects (new building / restructuring / additions)

Construction cost plan

Building blueprints or description

Building permit (any service / labor contracts)

Sales documentation

Current abstract of title (any copy of purchase agreement / draft)

For the borrower

For the borrower

Current wages and assets statement, and last tax declaration

Company

Current balance sheet and income statement from the last three years, including auditor's report

Current abstract from the commercial registry (no older than six months)

Information any debt-collection proceedings (no older than six months)

Summary of borrower's capital

Account balances, securities

Current account / custody account statement

Retirement savings account

Pension fund certification/Vested benefit assets (Pillar 2)

Pension fund balances pillar 3 account

Life insurance policies

Copy statement of assets

Current repurchase value

Other _____

Loans / other

Third-party funds certification

Copy loan agreement

Other _____