

Mortgage application

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 |

Mortgage application

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)

Zum Kreditnehmer

For the borrower

Current wages and assets statement, or last tax decla

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 _____