



Vale Life & Mortgage Planning – Standard Packaging Requirements*

Latest 3 monthly payslips or 4 weekly payslips– **Employed**

Last 2yrs tax calculations **plus tax year overviews** from Inland Revenue – **Self Employed Only – sole traders**

Latest 2yrs Accounts – Ltd Company Directors

Latest 3 monthly bank statements (showing salary credit if employed) and regular outgoings - **(name & address clearly shown)**

Valid Passport or Driving Licence

Latest Annual Mortgage Statement (if applicable)

Proof of address (within 3 months)

Proof of deposit (purchase only)

Other Items

Life Assurance Policy

Sales Memo Letter (Purchase)

Planning Permission/Drawings/Build Costs – Self Build

***Please ensure all documents are named correctly prior to sending**

In all cases it is advisable to obtain a credit report. We advise using <https://www.checkmyfile.com/>