art.nr. 0116.10.02/01042022

Checklist for a Complete Financial File

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Own Money / Assets Savings Investments		Recent account statement Recent account statement
Pension Overview of future pension Employer pension statement Individually closed products		Recent overview of future pension via www.mijnpensioenoverzicht.nl Latest pension statement from the current employer. Recent overview of individually closed pension/annuityproducts.
Current Mortgage Mortgage Debt Mortgage Deed Interest IB 2012 Value Overview Penalty Calculation Renewal Proposal		Fiscal overview of the last calendar year with indication of remaining debt. Copy of the mortgage deed (possibly of multiple mortgage registrations) Overview with interest rate(s) and duration of the fixed interest period. In connection with the mortgage balance on 31-12-2012 (transitional law) Overview of accumulated value in repayment insurance or investment account. Calculation of penalty by the current lender for early full repayment. Proposal from the current lender specifying the interest rate at which th current loan can be continued.
Current own home Ownership Property Assessment Valuation report Renovation Leasehold Desktop appraisal		Copy of ownership Deed Value statement for the current Property/sales deed Copy of the appraised value for Property Tax by the Municipality Copy of the most recent (NWWI) appraisal report Specification of additional work/renovation Leasehold agreement Original desktop appraisal report
New mortgage Quotation Quotation Application form		Signed interest proposal Signed binding quotation Completed and signed mortgage application form.
New insurance Quotation Application form Health Declaration		Signed insurance quotation Completed and signed insurance application form Completed and signed life insurance application form(s) Completed and signed health declarations
New own home Purchase agreement Purchase/Construction agreement Building inspection Appraisal Desktop appraisal		Copy of the purchase agreement Copy of the purchase/construction agreement Copy of the building inspection Original (NWWI) appraisal report (we can arrange this for you) Original desktop appraisal report
Other forms Budgeting form Starter form		Starter Loan (SVn)