

Personal information

Applicant 1		Applicant 2	
Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female	Gender	<input type="checkbox"/> Male <input type="checkbox"/> Female
First name	<input type="text"/>	First name	<input type="text"/>
Last name	<input type="text"/>	Last name	<input type="text"/>
Maiden name	<input type="text"/>	Maiden name	<input type="text"/>
Day of birth, nationality	<input type="text"/>	Day of birth, nationality	<input type="text"/>
Street	<input type="text"/>	Street	<input type="text"/>
Postcode	<input type="text"/> City <input type="text"/>	Postcode	<input type="text"/> City <input type="text"/>
ID type, Date of issue	<input type="text"/>	ID type, Date of issue	<input type="text"/>
Authority	<input type="text"/>	Authority	<input type="text"/>
ID number	<input type="text"/>	ID number	<input type="text"/>
Marital status	<input type="text"/>	Marital status	<input type="text"/>
Since	<input type="text"/>	Since	<input type="text"/>
Matrimonial property rights	<input type="text"/>	Matrimonial property rights	<input type="text"/>
Work phone number	<input type="text"/>	Work phone number	<input type="text"/>
Home phone number	<input type="text"/>	Home phone number	<input type="text"/>
Mobile number	<input type="text"/>	Mobile number	<input type="text"/>
E-Mail address	<input type="text"/>	E-Mail address	<input type="text"/>
Employer, city	<input type="text"/>	Employer, city	<input type="text"/>
Branch	<input type="text"/>	Branch	<input type="text"/>
Occupational group	<input type="text"/>	Occupational group	<input type="text"/>
Since	<input type="text"/>	Since	<input type="text"/>
Occupation	<input type="text"/>	Occupation	<input type="text"/>
Child's/Children's date of birth	Child's/Children's date of birth		
1. Child	2. Child	3. Child	1. Child 2. Child 3. Child

Income

	Applicant 1	Applicant 2
Net income	€	€
Christmas & holiday pay	€	€
Secondary employment	€	€
Child allowance	€	€
Interest income	€	€
Rental income of new property	€	€
Rental income - present	€	€
Maintenance cost	€	€
Additional income	€	€
Total	€	€

Expenses

	Applicant 1	Applicant 2
Cost of living	€	€
Maintenance cost of new property	€	€
Previous maintenance cost	€	€
Own rent - present	€	€
Own rent - new	€	€
Liabilities	€	€
Life & pension insurances	€	€
Home saving rate (Bausparer)	€	€
Health insurances	€	€
Car costs	€	€
Maintenance costs	€	€
Other expenses	€	€
Total	€	€

Assets	
Equity capital invested	<input type="text"/> €
Plot of land fully paid	<input type="text"/> €
Savings & bank balances	<input type="text"/> €
Securities/shares	<input type="text"/> €
Balance of home savings (Bausparer)	<input type="text"/> €
Balance of life insurance	<input type="text"/> €
Real estate ownership	<input type="text"/> €
Other assets	<input type="text"/> €
Total	<input type="text"/> €

Liabilities	
Credits	<input type="text"/> €
Leasing	<input type="text"/> €
Guaranties	<input type="text"/> €
Real estate loans	<input type="text"/> €
Other liabilities	<input type="text"/> €
Total	<input type="text"/> €

Specification of the property

Reason of financing	<input type="text"/>	Postcode	<input type="text"/>	City	<input type="text"/>
		Street address	<input type="text"/>		

Construction year	<input type="text"/>	Move-in date	<input type="text"/>
Date of modernisation	<input type="text"/>	Type of modernisation	<input type="text"/>
Type of property	<input type="text"/>	Type of use	<input type="text"/>
Construction method	<input type="text"/>	Cellar	<input type="text"/>
Property condition	<input type="text"/>	Residential area	<input type="text"/>
Floors	<input type="text"/>	Number of units	<input type="text"/>
Living area own use	<input type="text"/>	Living area used by 3rd party	<input type="text"/>
Floor space own use	<input type="text"/>	Floor space used by 3rd party	<input type="text"/>
Cubature	<input type="text"/>	Size of the plot	<input type="text"/>
Property length	<input type="text"/>	Property width	<input type="text"/>

Land register

Land register of	<input type="text"/>	Local court	<input type="text"/>
Volume / book	<input type="text"/>	Sheet	<input type="text"/>
Plot	<input type="text"/>	Piece of land	<input type="text"/>
Apartment number	<input type="text"/>	Co-ownership share	<input type="text"/>
Leasehold owner	<input type="text"/>	Ground rent per month	<input type="text"/>

Debt rescheduling

Release date	<input type="text"/>	Compensation payment	<input type="text"/>	€
Acquisition date	<input type="text"/>	Purchase price	<input type="text"/>	€
Investment	<input type="text"/>	Current market value	<input type="text"/>	€

Cost plan / determination of financing needs

Costs for plot of land	<input type="text"/>	€	Paid plot of land	<input type="text"/>	€
Development costs	<input type="text"/>	€	Equity	<input type="text"/>	€
Purchase price / building costs	<input type="text"/>	€	Personal contribution wages	<input type="text"/>	€
Garage	<input type="text"/>	€	Assigned bulding savings deposits	<input type="text"/>	€
Personal contribution wages & material	<input type="text"/>	€	Total equity capital	<input type="text"/>	€
Expension / renovation	<input type="text"/>	€			
House connection costs	<input type="text"/>	€	Equity pre-financing	<input type="text"/>	€
Costs and architect fees	<input type="text"/>	€	Home saving loans (Bausparer)	<input type="text"/>	€
Outdoor facilities	<input type="text"/>	€	3rd party liabilities	<input type="text"/>	€
Others	<input type="text"/>	€	Total 3rd party liabilities	<input type="text"/>	€
Property costs	<input type="text"/>	€	Total costs	<input type="text"/>	€
Property transfer tax	<input type="text"/>	€	minus equity	<input type="text"/>	€
Notary / land register	<input type="text"/>	€	minus 3rd party liabilities	<input type="text"/>	€
Brokerage fee	<input type="text"/>	€	Financial requirements	<input type="text"/>	€
Payment protection insurance	<input type="text"/>	€	Disagio / fees	<input type="text"/>	€
Total costs	<input type="text"/>	€	Gross loan amount	<input type="text"/>	€

Declaration of applicant/s

The following data mentioned will be collected and used by the broker, service providers assigned by the broker for the limited purpose of your personal financial advice (procurement, processing and extension of loans) and their financing partners. These operations include the exchange of documents between the broker, service provider and their financing partners. This concerns the following data:

- Personal details/documents e.g. name, address, email address, telephone, family status, profession, personal financial circumstances and liabilities, income and expenditures
- Information/documents for the financing property and the utilisation of the loan respectively
- Information/documents for the financing and transaction, e.g. balance, interest calculation, term of the loan, conditions for disbursement, application status, processing status
- Information/documents for the follow-up financing, e.g. remaining balance, rate, interest rate

There will be no data transferred to any (commercial) third parties.

I/we am/are informed about the fact that an exchange of electronic data between the financing partners, the broker and the service provider has to be made by secure Internet connection supported by best available technology (e.g. SSL coding).

Within the financial advisory service I/we agree that the financing partners are transferring above named information to the broker and the service provider if necessary. For this purpose, I/we release the financing partners from the banking confidentiality. In this regard the broker (and his service provider) is permitted to receive in particular an executed copy of the correspondence (e.g. contract of loan). If a financing partner deploys an external service agency for the administration of loans, this enterprise is included into this declaration. I/we am/are able to abrogate the declaration concerning financing partners, the broker or the service provider at any time.

I/we affirm that there are no measures of compulsory execution, e.g. repossession, garnishment of wage and salary, declaration in lieu of oath about economic circumstance, and insolvency proceedings. I/we discharged all payment obligations in the past at all times. Otherwise, point of time and reasons need to be stated on a separate sheet.

I/we confirm with my/our signature that all information given is complete and truthful. I/we am/are conscious about the fact that wrong information, which the broker will forward to the service provider or financing partner in my/our order, may result in a cancellation of the contract by the financing partner.

City, Date

Signature Applicant 1

Signature Applicant 2

SCHUFA-Declaration for the financing partner

My/our personally selected financing partner will gather information at the SCHUFA Holding AG (Kormoranweg 5, 65201 Wiesbaden, Germany) before the loan will be paid off.

I/we permit my/our personally selected financing partner to transfer data to the SCHUFA Holding AG (Kormoranweg 5, 65201 Wiesbaden, Germany). This data includes details about my/our request of the loan, the acceptance (by the borrower/s) of the legally secured mortgage and repayment of the loan.

In case of non-contractual behaviour the financing partner will transfer information about the infringement to the SCHUFA (e.g. amount of debits after termination). These notices may only take place in accordance with the Federal Data Protection Act.

In this respect the financing partner is not abided by the banking confidentiality.

The SCHUFA stores and forwards the data to their contractual parties in the EU-domestic market, in order to provide information for the evaluation of the financial standing of natural persons. Contractual parties of the SCHUFA are mainly credit institutions as well as credit card- and leasing-companies.

The SCHUFA also provides enterprises dealing with trading, telecommunication- and other deliverable and services on credit with information. In case that there is legitimate interest only, the SCHUFA makes personal data available. For determination of borrowers' residence the SCHUFA communicates address data. An estimation of the credit risk will be calculated on the basis of the stored data by the SCHUFA and will be communicated to their contractual parties (Score procedure).

I/we am/are allowed to get information about my/our personal stored data at the SCHUFA. Eventually, more detailed information about the SCHUFA's information and score procedure can be ordered. The addresses of the SCHUFA are as follows:

SCHUFA Holding AG, Consumer Service, Postfach 600509, 44845 Bochum, Germany

SCHUFA Holding AG, Consumer Service, Postfach 5640, 30056 Hannover, Germany

City, Date

Signature Applicant 1

Signature Applicant 2

Documents required

For a binding offer and before the final loan commitment we need specified documents (listed below), in order to examine data (copies are sufficient). Our advice: The sooner the documents required will be received, the faster the processing up to loan commitment will take place.

Personal documents

	Obtainable at	Attached
Signed financing inquiry (signed by ALL borrowers)	Own documents	<input type="checkbox"/>
Payroll accounting of the last 3 months	Own documents/Employer	<input type="checkbox"/>
Income tax returns of the last 2 years (In case the notification of the last year's income tax is not yet available, a copy of the income tax card or the payroll accounting of December is sufficient)	Own documents/Fiscal authorities	<input type="checkbox"/>
Evidence of own capital, used as collateral security (e.g. statement of the bank account)	Own documents/Bank	<input type="checkbox"/>
Evidence of existing income from capital investment, property (e.g. statement of the bank account including income of property)	Own documents/Bank	<input type="checkbox"/>
For self-employed persons (making the balance): Current business assessment (signed by the accountant)	Own documents/Accountant	<input type="checkbox"/>
Financial statements of the last 2 years (In case the financial statement of the last year is not yet available, a business assessment per December is sufficient)	Own documents/Accountant	<input type="checkbox"/>
For self-employed persons/freelances (not making up the balance) Signed current sales figures	Own documents/Accountant	<input type="checkbox"/>
Signed revenue and profit statement of the last 2 years (In case the revenue and profit statement of the last year is not yet available, the signed sales figures per December are sufficient)	Own documents/Accountant	<input type="checkbox"/>
For retired persons: Current notice of pension granted	Own documents/Fiscal authorities	<input type="checkbox"/>

Documentation of the Property

	Obtainable at	Attached
Current abstract of title (certificated within the last three months)	Registry of deeds/Notary	<input type="checkbox"/>
Construction drawing / horizontal projection	Property developer/Architect	<input type="checkbox"/>
Reference documentation (calculation of living area and converted space, elevation, ratio, specification or photos from the inside)	Estate agent/Salesperson/Architect/ Property developer	<input type="checkbox"/>
Records of planned personal contribution	Own documents	<input type="checkbox"/>
Records of planned personal contribution	Own documents	<input type="checkbox"/>
Records of planned personal contribution	Own documents	<input type="checkbox"/>
Current pictures of the property (original or colour copy and as far as the development has started)	Estate agent/Salesperson	<input type="checkbox"/>
Evidence for planned or even implemented refurbishment (estimation/statement of costs)	Estate agent/Salesperson/Architect	<input type="checkbox"/>
For apartments: Declaration of partition	Notary/Property developer	<input type="checkbox"/>
For emphyteusis: Contract for heritable building right	Salesperson/Disposer of emphyteusis	<input type="checkbox"/>