



BUSY BEE

COMMERCIAL FINANCE

PERSONAL ASSETS AND LIABILITIES STATEMENT

YOU CAN COMPLETE THIS FORM ON YOUR PC BY FILLING IN THE FIELDS IN
MICROSOFT WORD

PLEASE COMPLETE THE INFORMATION AS FULLY AND ACCURATELY AS
POSSIBLE, AS THE INFORMATION YOU PROVIDE COULD BE USED TO SUBMIT
YOUR APPLICATION TO A MORTGAGE LENDER

IF YOU NEED ASSISTANCE IN COMPLETING THE FORM, OR HAVE ANY
QUESTIONS, PLEASE DO NOT HESITATE TO ASK FOR HELP

**PLEASE RETURN THIS FORM TO
FUNDING@BUSYBEECOMMERCIALFINANCE.CO.UK**

Personal Assets and Liabilities Statement

Personal Details

	Applicant	Partner
Title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other _____	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Ms <input type="checkbox"/> Miss <input type="checkbox"/> Other _____
Full Name		
Date of Birth		
Contact Number		
Email Address		
Relationship Status	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed
Residential Status	<input type="checkbox"/> Homeowner (with mortgage) <input type="checkbox"/> Homeowner (no mortgage) <input type="checkbox"/> Tenant <input type="checkbox"/> Living with Friends / Living with Family	<input type="checkbox"/> Homeowner (with mortgage) <input type="checkbox"/> Homeowner (no mortgage) <input type="checkbox"/> Tenant <input type="checkbox"/> Living with Friends / Living with Family
Nationality		
Number of Dependants		
National Insurance Number		

Address Details

Note: We will need your address history for the past 3 years to process your application. Please include your current address details and any previous addresses in the spaces provided below and continue on a separate sheet if required.

Address		
Post Code		
Time at Address		

Address		
Post Code		
Time at Address		

Address		
Post Code		
Time at Address		

Personal Assets and Liabilities Statement

Self-Employment Details

Note: We will need your last 3 years of employment history to process your application. Please continue on a separate sheet if required.

	Applicant	Partner
Position		
Shareholding		
Annual Income		
Expected Retirement Age		
If Less than 3 years, please provide a brief description of what you did previously		

Employment Details (if applicable)

Note: We will need your last 3 years of employment history to process your application. Please continue on a separate sheet if required. We will not contact your current or previous employers without first obtaining your permission

	Applicant	Partner
Occupation		
Employer		
Gross Annual Salary		
Date Employment Commenced		
Are there any expected changes to your employment		

Monthly Income

	Applicant	Partner
Net Drawings / Salary	£	£
State Benefits	£	£
Investment Income	£	£
Rental Income	£	£
Other Regular Income	£	£
Total Individual Income	£	£
Combined Monthly Income		£

Personal Assets and Liabilities Statement

Monthly Expenditure

Mortgage/Rent/Board	
Second Charges(s)	
Unsecured Borrowing	
Maintenance	
Other Expenditure	
Sub Total (A)	

Household Expenditure	
Electricity	
Gas/Oil	
Water	
Council Tax	
Service Charge / Ground Rent	
Food/Housekeeping	
Repairs/Decorating	
Clothing / Health & Beauty	
Telephone / Mobiles	
TV/Internet Packages	
Personal Expenditure	
Fuel/Car Maintenance	
Public Transport / Other Travel	
School Fees	
Childcare	
Medical Expenses	
Contingencies	
Other Expenses	
Sub Total (B)	

Insurances	
Buildings and Contents	
Life / Income Protection	
Car / Motor	
Health / Dental	
Other Insurances	
Sub Total (C)	

Total Monthly Outgoings (A+B+C)	
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Net Disposable (Total Monthly Income – Total Monthly Outgoings)	
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Personal Assets and Liabilities Statement

Current Residential Property (only required if you are a homeowner)

Owned in	<input type="checkbox"/> Sole Name <input type="checkbox"/> Joint Names
Property Type	<input type="checkbox"/> Flat <input type="checkbox"/> Maisonette <input type="checkbox"/> Bungalow <input type="checkbox"/> Detached <input type="checkbox"/> Semi Detached <input type="checkbox"/> Mid Terraced <input type="checkbox"/> End Terraced
If a flat / apartment, how many floors in the block?	
Was it previously owned by the council	<input type="checkbox"/> Yes <input type="checkbox"/> No
Original Purchase Price	
Original Purchase Date	
How many bedrooms	
Current Value	
Is there a mortgage on the property	<input type="checkbox"/> Yes <input type="checkbox"/> No
Current Lender	
What is the Mortgage Balance	
Monthly Payment	
Has there been any missed or late payments?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Term Remaining	
Repayment Method	<input type="checkbox"/> Capital and Interest <input type="checkbox"/> Interest Only
Interest Rate Type	<input type="checkbox"/> Fixed <input type="checkbox"/> Variable <input type="checkbox"/> Capped <input type="checkbox"/> Discounted
Current Rate	
Initial Rate End Date (if applicable)	
Early Redemption Penalty (if applicable)	
Have you had any second charges or further advances? If yes, please provide details	<input type="checkbox"/> Yes <input type="checkbox"/> No

Other Properties

Number of Properties on Property Portfolio Sheet	
Total Value of Portfolio Properties	£

Other Assets

Please include details of any cash, shares, life policies, crypto currencies, Jewellery, Art, etc

Type of Asset	Description	Value

Personal Liabilities

Total of all mortgage balances outstanding (personal + portfolio)	
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Personal Assets and Liabilities Statement

Credit Commitments

Please include details of any debts you currently owe including credit cards or personal loans. You do not need to include details of mortgages listed above

Lender	Type of Credit	Balance	Credit Limit	End Date

Have you provided any personal guarantees?

Who was the guarantee granted for?	
Purpose of the guarantee?	
The amount	£

Who was the guarantee granted for?	
Purpose of the guarantee?	
The amount	£

Net Worth (Total Assets – Total Liabilities)	
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Credit History

Have you ever:

Had a loan / mortgage application refused?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Had a CCJ or defaulted on finance?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Been declared bankrupt or been subject to an IVA?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Had a property repossessed?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Been in arrears on any loan?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Additional Info