

**SOURCE OF FUNDS FORM**  
For completion and where relevant for signing by client

<b>CLIENT</b>	Mr	Mrs	Ms	Surname	Client_(global).Name
Forenames			Previous name (or alias)		
Address					
Postcode					
Capacity [when acting on behalf of a business]: Director / Secretary / Partner / Other					

	<b>1. Source</b>	<b>2. Details / Evidence to be supplied by you</b>	<b>3. Please tick if relevant</b>	<b>4. Approximate amount and comment</b>
1.	Sale of existing property	Address: ..... .....		Net proceeds after agents' fees  Amount: £.....
2.	Building Society or Bank mortgage on property being purchased or other property for funding	<u>Send us:</u>  Copy mortgage / loan offer		Name of institution: .....  Amount: £.....
3.	Inheritance	<u>Send us:</u>  Copy Estate Accounts or  copy solicitors letter with cheque or other evidence		Amount: £.....
4.	Savings	<u>Send us copy:</u>  Building Society passbook or Building Society account or Bank statement(s)  Provide explanation of how acquired		[Evidence of source of wealth needed and on file?]  Amount: £.....
5.	Gift	<u>Please supply:</u>  Donor(s) name:		Relationship to you: .....

		<p>.....</p> <p>Donor(s) address:</p> <p>.....</p> <p>.....</p> <p>[Over £5,000 source of wealth required]</p> <p>[Over £10,000 ID check also required]</p>		<p>Amount: £.....</p>
6.	Private loan	<p>Lender(s) name:</p> <p>.....</p> <p>Lender(s) address:</p> <p>.....</p> <p>.....</p> <p>[Over £5,000 source of wealth required]</p> <p>[Over £10,000 ID check also required]</p>		<p>Relationship to you:</p> <p>.....</p> <p>Amount: £.....</p>
7.	Proceeds of sale of investments or securities	<p><u>Send us:</u></p> <p>Broker's / adviser's letter with cheque or</p> <p>Contract notes or other evidence</p>		
8.	Lifetime ISA (LISA) / Help to buy ISA	<p>LISA - How Many .....</p> <p>Help to Buy – How Many .....</p>		<p>Amount: £.....</p> <p>Amount: £.....</p>
9.	Other source(s):	<p>Supply details and supporting evidence:</p>		<p>Amount: £.....</p>

*The importance of advising my solicitors of any changes to the above has been explained to me. I understand that completion of a purchase might be delayed if there are late changes to the above that have not been explained by me/us to my/our adviser in advance.*

**Signed (client 1) .....** **Date: .....**

**Signed (client 2) .....** **Date: .....**