



PROPERTY PURCHASE & SALE DOCUMENT CHECKLIST

If you purchased a property during the year please provide the following:

1. Copy of purchase contract (front pages) showing the contract signing date, purchase cost & settlement date.
2. Copy of settlement statement from your solicitor.
3. How much you paid your solicitor to assist with the purchase (please provide a copy of the invoice).
4. Details of the following costs relating to the purchase:
 - Stamp duty on purchase (not for loan)
 - Titles fee on purchase
 - Building inspection & pest inspection costs
 - Any other costs linked to the purchase
5. Details of the costs paid to set up the loan such as:
 - Copy of loan documentation pages containing the fees and charges
 - Copy of first page of the loan statement from the lender after the initial draw down
 - Mortgage stamp duty
 - Mortgage registration fees
 - Mortgage discharge fees
 - Loan establishment fee
 - Mortgage valuation fee / loan preparation fee
 - Broker's fee
 - Mortgage insurance
6. A full copy of your quantity surveyor's report and amount paid to prepare it.



If you sold a property during the year please provide the following:

1. Copy of sales contract (front pages) showing the contract signing date, sale cost & settlement date.
2. Copy of settlement statement from your solicitor.
3. How much you paid your solicitor to assist with the sale (please provide a copy of the invoice).
4. Details of the following costs relating to the sale:
 - Agents commission for the sale
 - Advertising costs for the sale
 - Any other costs linked to the sale
5. Copy of the final loan statement showing the loan payout, the closure of the loan and any fees associated with the payout.