



Mortgage Application Form

Please complete in BLOCK CAPITALS, using BLACK INK. Use a separate sheet if more space is required.

Your privacy is very important to us. For more information about how we handle and protect the information you provide us, visit stewardship.org.uk/privacy.

A. Church or Organisation Details

Name:		
Charity registration number:	Correspondent name:	
Address:		
	Postcode:	
Telephone:	Email:	
Number of years established:		
What type of governing document do you possess (e.g. Trust Deed):		

Church details (only complete this section if you are a church):

How many people are in your fellowship/membership?

Now:	Last year:	The year before:

Does the church belong to any denominational group or fellowship? Yes No

If YES, please give details:

Number of staff workers (full time equivalent):

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Organisation details (only complete this section if you are an organisation):

Number of staff/workers:	Number of supporters:

B. Building Details

Please provide details about the existing building to be developed or the new building to be purchased/built:

Address/location:

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Type of location (e.g. town centre, housing estate):

Type of construction (e.g. brick and tiled roof):

Please detail any unusual features:

Is planning consent required? Yes No If YES, has it been obtained?

Please supply with this form a copy of the Valuation Report: Report attached Report to follow

Is the property: Freehold Leasehold If leasehold, when does the lease run out:

Please provide details of what the new property or development will consist of and how will it be used:

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If building works are involved, when are they expected to: Start:

M	M	Y	Y	Y	Y
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 Finish:

M	M	Y	Y	Y	Y
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By what date are the funds required:

D	D	M	M	Y	Y	Y	Y
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Please note that Stewardship cannot guarantee completion by any given date.

OFFICE USE ONLY:	Date received:	Reference:
Notes:		

C. About the Finances

Gross total: Already paid: Current position:

1. The Project Cost

Purchase price (where relevant):	£	£	£
Construction/development costs:	£	£	£
Fittings and furnishings (if any):	£	£	£
Professional fees (architect, solicitor etc):	£	£	£
Other costs, if any (please detail):			
1.	£	£	£
2.	£	£	£
3.	£	£	£
Total projects costs (TOTAL 1):			£

2. Funds Raised

Cash in hand (Building fund):	£	
From expected sale of premises, where relevant:	£	
Promised from members and supporters:	£	
Grants from church bodies and trusts, etc. (Please give detail/timing in section G):	£	
Proposed third party loans (if applicable):	£	
<i>Funds raised sub total:</i>		£

2(A). Current Loans Outstanding*

Duration: Interest rate: Balance:

Lender:	£	£	£
1.	£	£	£
2.	£	£	£
3.	£	£	£
Total funds raised (TOTAL 2):			£
Amount still to be raised: (TOTAL 1 less TOTAL 2)			£

Apart from the Stewardship (UKET) mortgage, how do you expect to raise any shortfall:

*Including private loans, loans from church bodies and trusts, and commercial loans.

Mortgage request details

Amount requested:	£
Length of term:*	years *Maximum 15 years.

About your finances

Do the most recent accounts show typical year on year income and expenditure? Yes No

If NO, please outline exceptional items of income or expenditure, assets or liabilities and how you expect these to change in future years:

D. About the Borrowers

The persons to enter into the mortgage will be those persons who hold or will hold the legal title on behalf of the church or organisation. They will normally be described as trustees. If the property is held (or to be held) by a church body as a corporate trustee, that body will need to enter into the mortgage but may still require local trustees or leaders to undertake to repay the mortgage. Stewardship is required by law to carry out identification checks on all trustees. We will only carry out these checks when we have received an acceptance of offer. Therefore, please provide full details below:

1. Details of Borrower/Trustee:

Firstname:	Middle name:
Surname:	Date of Birth: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Telephone:	

Current address:*

Address:	
Postcode:	Time at this address: <input type="text"/> <input type="text"/> Years <input type="text"/> <input type="text"/> Months

*If you have lived at this address for less than five years, please provide previous address details below.

Previous addresses (please continue on a separate sheet if necessary):

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I consent to Stewardship undertaking an ID check:

My signature:	Date:
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Firstname:	Middle name:
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Telephone:	

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Telephone:	

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If there are more than six trustees, please photocopy this page and use as a continuation sheet.

Are any of the above persons listed subject to any bankruptcy orders or court judgments?

Yes

No

If YES, please give details:

If the property is vested or will be vested in a corporate trustee, please give details:

If the church or organisation is a registered company, please supply the registration number:

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E. What You Need to Include With This Application

Please tick the box in each applicable case to indicate items you are enclosing. Those marked * should be sent in every case:

- Copy of the Trust Deed or other constituting document of the church or organisation*
- Valuation Report. Formal valuations should be carried by a member of the RICS Valuer Registration Scheme. For further details please visit: rics.org/vrs. Please contact us for further information regarding valuations.
- Copy last 3 years annual report and accounts, with examination or audit certificate as appropriate*
- Copies of bank statements for all bank accounts covering the past three to four months*
- List of regular services and activities*
- Copy of any applicable Statement of Faith (unless included in Trust Deed etc.)*
- Cheque for application fee made payable to Stewardship. For application fee amounts, visit: stewardship.org.uk/fees-supportservices

F. Your Consent to Hear From Us

We'd love to keep in contact with you by email with all the latest news, free resources and advice from Stewardship. We'll never sell your personal information and will always treat it with the utmost care. You can change your consent preferences or unsubscribe at any time.

Yes please:

- I'd like to receive **all** the latest news, service updates and free resources.
- I'd like to receive the latest news, service updates and free resources **specifically relating to churches and Christian charities.**

G. Declaration

I hereby declare that the information given in this form is true to the best of my knowledge and I submit this application on behalf of the church/organisation named above with the knowledge and authority of the trustees or other responsible body:

My signature:

Date:

Printed name:

Capacity:

We take the handling and storage of your data very seriously and will only use it for the ways we explain in your application and our privacy notice. You have the right to object to how we process your data, including opting out of direct marketing, at any time.

Once complete, please return to: Freepost RTJE-CBKS-LAES, Stewardship, 1 Lamb's Passage, London EC1Y 8AB.

