

Butterfield Mortgage and Loan Application

Application For (Please Indicate) Failure to complete all relevant information may delay the processing of this application.

☐ Personal loan

☐ Mortgage

☐ Individual application

☐ Joint application

Date

Purpose of loan

Sale price (if applicable)

Amount requested

Term requested

Primary Applicant

Personal Information

FOR BANK USE ONLY

CIF no.

FLL application no.

ID type ID number

☐ Mr.☐ Mrs.☐ Ms.☐ Miss

Last name

First name

Middle name(s)

Maiden name

Birth date

Mother's maiden name(for security purposes)

Social Insurance Number

Marital status

No. of dependents

Ages

Bermudian

☐ Yes

☐ No

Nationality

Work permit

☐ Yes

☐ No

Date moved to Bermuda

Relation to Butterfield

☐ Customer

☐ Employee/Director

Address

Home address

Parish

Postal code

Mailing address (if different from above)

Time at present address (yrs)

Previous address

Time at previous address (yrs)

E-mail address

Home telephone

Cellular number

Residence

☐ Rent

☐ Own

☐ Own Free & Clear

☐ Live with relatives

Name and phone number of mortgage holder or landlord

Employment

Name of present employer

Occupation

Years of employment

Work telephone

Previous employer

Years of employment

Do you have any outstanding debts with Bermuda Credit Association?

☐ Yes

☐ No

If yes, give details

Do you have any outstanding judgments or are you a defendant in any suits or legal action?

☐ Yes

☐ No

If yes, give details

Do you have any obligations as an endorser, co-maker or guarantor?

☐ Yes

☐ No

If yes, give details

I am also interested in:

☐ Credit cards

☐ Savings accounts

☐ Chequing accounts

☐ Insurance Other (please state)

Personal Information

Relationship to primary applicant _____

ID type _____ ID number _____

☐ Mr. ☐ Mrs. ☐ Ms. ☐ Miss

Last name _____ First name _____ Middle name(s) _____ Maiden name _____

Birth date DD/MM/YY _____ Mother's maiden name(for security purposes) _____ Social Insurance Number _____

Marital status _____ No. of dependents _____ Ages _____

Bermudian ☐ Yes ☐ No Nationality _____ Work permit ☐ Yes ☐ No Date moved to Bermuda DD/MM/YY _____Relation to Butterfield ☐ Customer ☐ Employee/Director

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CIF no. _____

FLL application no. _____

Address

Home address _____ Parish _____ Postal code _____

Mailing address (if different from above) _____ Time at present address (yrs) _____

Previous address _____ Time at previous address (yrs) _____

E-mail address _____ Home telephone _____ Cellular number _____

Residence ☐ Rent ☐ Own ☐ Own Free & Clear ☐ Live with relatives

Name and phone number of mortgage holder or Landlord _____

Employment

Name of present employer _____ Occupation _____ Years of employment _____ Work telephone _____

Previous employer _____ Years of employment _____

Do you have any outstanding debts with Bermuda Credit Association?

☐ Yes ☐ No If yes, give details _____

Do you have any outstanding judgements or are you a defendant in any suits or legal action?

☐ Yes ☐ No If yes, give details _____

Do you have any obligations as an endorser, co-maker or guarantor?

☐ Yes ☐ No If yes, give details _____

I am also interested in:

☐ Credit cards ☐ Savings accounts ☐ Chequing accounts ☐ Insurance Other (please state) _____

I/We hereby declare that the information which I/we have arranged to provide to you in support of this application is true and complete in all material respects and that no information is omitted in relation to any of the items describing my/our liabilities.

I/We authorise you to contact such persons as you think fit to verify the correctness and completeness of this information and authorise any such persons to release it to you. Kindly debit \$_____ from my/our account I/N/O_____ commencing on _____ and on the _____ day of the month on a ☐ monthly / ☐ quarterly / ☐ annual / ☐ other: _____ basis. This authority is to remain in effect until cancelled in writing by me/us. In the event my/our primary account has insufficient funds to cover my/our loan payments, I/we hereby give authorisation for the Bank to debit any other joint account with the same signatory requirements or any individual account in any of our names to cover the monthly commitment.

Signature of primary applicant _____ Date _____ Signature of secondary applicant _____ Date _____

DD/MM/YYYYDD/MM/YYYY

Income Statement

MONTHLY INCOME (1)

Primary applicant's salary (net)	\$
Secondary applicant's salary (net)	\$
Rental income (halved)	\$
Other income (please specify)	\$
	\$
Bonus	\$
Pension	\$
Total monthly income	\$

Notes: (1) Enter the income you receive on a regular basis (overtime, second job, alimony, investments, 50% of rental income, etc.) (2) Include your total estimated monthly mortgage and/or personal loan payment(s). As a guide, your total fixed monthly expenses should not exceed 50% of your total monthly income.

MONTHLY FIXED EXPENSES (2)

Mortgage	\$
Rent	\$
Insurance premiums / maintenance fees	\$
Installment payment / loans	
Car	\$
Furniture	\$
Personal loans	\$
Credit cards	\$
Total	\$
Total fixed monthly expenses	\$

CURRENT ASSETS (What I have)

BALANCE

Chequing and Savings Accounts	\$
	\$
	\$
	\$
Term Deposits	\$
Investments	\$
Stocks/Mutual Funds	\$
What I'm owed	\$
Other (please specify)	\$
	\$
	\$
Total current assets	\$

LIABILITIES (What I owe)

BALANCE

Mortgage	
	\$
Personal loans (please describe below)	
	\$
	\$
	\$
Credit card limits	
Butterfield	\$
Other (please specify)	\$
	\$
Other debts (please specify)	\$
	\$
Total liabilities	\$

Net worth

(Total Assets minus
Total Liabilities)

\$

Insurance: I wish to obtain the following insurance:

- ☐ Home & Contents
 ☐ Motorcar & Motorcycle
☐ Yacht & Pleasure Craft
 ☐ Creditor Life & Disability

Signature of primary applicant | Date | Signature of secondary applicant | Date |

DD/MM/YYYY

DD/MM/YYYY

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Additional amount approved Amount

Amount | Facility type | Expiry date | DD/MM/YYYY