

Checklist for Mortgage Application Documents

What Documentation Do I Need?	Where Can I Get the Documentation?	O.K.
Current salary certificate	Employer	<input type="radio"/>
Copy of last tax return including additional sheets	Self-declaration	<input type="radio"/>
Last two years' financial statements, i.e. balance sheets and income statements, of legal entities bearing liability (if self-employed)	Accountants	<input type="radio"/>
Statement showing Pillar 3 balance (if benefits are to be drawn in advance or pledged)	Pension fund foundation	<input type="radio"/>
Pension fund statement prior to withdrawal (if Pillar 2 benefits are drawn in advance or pledged)	Pension fund	<input type="radio"/>
Pension fund statement after withdrawal (if Pillar 2 benefits are drawn in advance)	Pension fund	<input type="radio"/>
Pension fund regulations (if requested by the bank)	Pension fund	<input type="radio"/>
Up-to-date information on debt enforcement (if requested by the bank)	Debt enforcement office	<input type="radio"/>

All Real Estate/Properties O.K.

Land record extract (not more than 6 months old) and/or contract of sale/draft contract of sale	Seller/land register/notary	<input type="radio"/>
Survey map/copy of cadaster	Seller	<input type="radio"/>
Photos of the property (inside + outside)	Seller	<input type="radio"/>
Insurance certificate on building, stating its volume (in m ³)	Seller/cantonal buildings insurance office/ insurance company	<input type="radio"/>
Building rights agreement (for property with building rights)	Seller/building rights grantor	<input type="radio"/>
Site plan/floor plan (if available)	Seller/architect/builder-owner	<input type="radio"/>
Construction description (if available)	Seller/architect/builder-owner	<input type="radio"/>
Sales documentation (if available)	Seller/architect/builder-owner	<input type="radio"/>

Application for Construction Loan

O.K.

Building plans	Seller/architect/builder-owner	<input type="radio"/>
Cost estimate	Seller/architect/builder-owner	<input type="radio"/>
Volume in cubic metres (SIA)	Agent/seller/architect	<input type="radio"/>
Building permits	Building inspection authority	<input type="radio"/>
Building description	Agent/seller/architect/builder-owner	<input type="radio"/>
Copy of contract from general contractor (if property constructed by general contractor)	General contractor	<input type="radio"/>
In the case of condominium units: foundation certificate and budgeted sales prices		<input type="radio"/>

Condominium

O.K.

Plan of condominium indicating size of net living area and ancillary rooms in m ² (apartment, cellar, hobby rooms, parking spaces, etc.)	Seller/architect/builder-owner	<input type="radio"/>
User regulations of condominium association	Seller/condominium association	<input type="radio"/>

Other

O.K.

Current rent schedule (number of apartments, size of each apartment, amount of rent, etc.)		<input type="radio"/>
Property valuation (if available)	Real estate valuer	<input type="radio"/>

Contact Us for an Appointment

Opening hours: Monday through Friday from 8:00 to 20:00

Tel.: 0844 100 114

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CREDIT SUISSE (Switzerland) Ltd.

P.O. Box 100

CH-8070 Zurich

[credit-suisse.com](https://www.credit-suisse.com)

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