Loan into Retirement Declaration Form

dudley building society

Mortgage Application/Account Number:

You have indicated that you wish the mortgage term to extend beyond your expected retirement age.

To help us process your request as quickly as possible, please provide full details of how you propose to fund the mortgage in retirement.

(1) Source of income/Lump sum	Name of provider	(2) Anticipated Annual Retirement Income	(3) Anticipated Lump Sum Payable at Retirement

(1) Source Examples – Company Scheme(s), Annuity, Shares, Savings, Investments.

(2) Please include details of anticipated annual income at retirement (excluding state benefits).

(3) Please include details of any savings/funds you intend to use to reduce the mortgage debt at retirement.

Additional Supporting Notes (if required)

Declaration:

I/we confirm the information that I/we have provided on this declaration form is a true declaration of my/our anticipated financial position at retirement. I/we understand that I/we will need to maintain my/our mortgage payments should my/our mortgage continue beyond my/our anticipated retirement age.

Signed

1. Date: / / (dd / mm / yy)

2. Date: / / (dd / mm / yy)

Name:

Name: