



Mortgage appointment checklist

Appointment date: _____
Time: _____
Officer's name: _____
Branch: _____
Branch telephone number: _____

At RBTT Bank we are committed to making banking convenient and easy.

The following documentation is required for processing your request:

Documentation

- Two (2) of the following valid forms of photo identification: Passport, National Identification Card or Driver's License. Where applicable, name changes must be evidenced by Marriage License, Affidavits, Deed Poll, etc.
- Proof of permanent address - not older than one (1) year; e.g. Utility Bill, Tax Assessment
- Proof of occupational income e.g. Letter from employer (not older than (6) months) or last two (2) pay slips. In the case of self employed persons, 3 years income tax statements/ or up to date financial statements/ or three (3) years deposit history from account
- Specific requirements for House & Land purchase:**
 - Original title deed and survey plan of land
 - Vendor's sale agreement
 - Recent valuation of land, not more than (6) months old
 - Property tax and income tax and national insurance clearance for the current year, if it is an existing property
- Specific requirements for Building Construction:**
 - Original title deed and survey plan of land
 - Vendor's sale agreement
 - Recent valuation of land, not more than (6) months old
 - Approved building plans
 - Detailed estimate of construction, including labor, dated and signed by the contractor
 - Quantity surveyor's report - please ask your sales officer to recommend a suitable surveyor
 - Evidence that clients can finance cost overruns

Should you need to reschedule or cancel your appointment, kindly contact us at least 24 hours in advance.

Thank you for making us your first choice.



Approved quantity surveyors/ valuers

Names	Telephone Number (1-758)
RBC Royal Bank	
Terry St. Clair	450 - 4137 / 484 - 3592
Faedra Trim	452 - 3324
Stephen Montrope	485 - 1750
Joachim Henry	484 - 0258
Charles Heywood	451 - 9381 / 484 3177
The Institute of Surveyors (St. Lucia) Limited	456 - 0197