

Mortgage pre-action protocol checklist

Name of court	Claim no.
Name of claimant	
Name of defendant	
Mortgage account number	

You must produce two copies of the Checklist on the day of the hearing.

Checklist

1. Is the possession claim within the scope of the Protocol? ☐ Yes ☐ No

 2. Have you provided the defendant with the information/notice in the Protocol —
 - (a) paragraph 5.1(1) ☐ Yes ☐ No If Yes, date provided: □□/□□/□□□□

 - (b) paragraph 5.1(2) ☐ Yes ☐ No If Yes, date provided: □□/□□/□□□□

 - (c) paragraph 5.7 ☐ Yes ☐ No If Yes, date of notice: □□/□□/□□□□

 3. Do you have evidence that the defendant has made a claim for —
 - Support for Mortgage Interest (SMI) ☐ Yes ☐ No
 - Mortgage Rescue Scheme (MRS), or ☐ Yes ☐ No
 - mortgage payment protection. ☐ Yes ☐ No

If Yes, please explain why possession proceedings are continuing.

 4. Is there an unresolved complaint by the defendant to the Financial Ombudsman Service that could justify postponing the possession claim? ☐ Yes ☐ No

If Yes, please explain why possession proceedings are continuing.

 5. Summarise the number and dates, in the three months prior to the date of this checklist, you attempted to discuss with the defendant ways of repaying the arrears.
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