



# Product Conversion Application Form – Intermediary

## How to complete the form

**1** Please use a **BLACK** pen



**2** Mark boxes like this  **–**  
If you make a mistake, do this



**3** Please use **BLOCK CAPITAL**    
**LETTERS** and leave one space between each word

## Intermediary Details

FCA Number

Intermediary Firm

Principal Name

Are you charging a broker fee for this mortgage? Yes  No

Amount

## Client Details

### Customer Name: Applicant 1

Salutation

Forename

Surname

### Customer Name: Applicant 2

Salutation

Forename

Surname

## Property Address

Property Address (Security Address)

Postal Address (if different to the property address and reason why)

## Product Details

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The customer requests to transfer the above numbered mortgage to the following:

### Fixed Rate Mortgage

Rate

End Date

Day      Month      Year  
 /  /

### Discount Variable Rate Mortgage

Rate

End Date

Day      Month      Year  
 /  /

### Co-ownership

Rate

End Date

Day      Month      Year  
 /  /

## Intermediary Statement

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I confirm that I have provided advice to the customer about the product chosen.

I understand that you will issue a Product Transfer Letter which will provide full details of the new mortgage product including the rate of interest that will apply. The rate of interest will be the rate that applies at the date the offer is issued.

I understand that the Product Transfer will not take place until the date that the current fixed rate period ends.

Signed	Date
<input type="text"/>	Day      Month      Year <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/>
Broker Name	
<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	

Lending criteria, terms and conditions apply.



Information correct as at September 2020

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