



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

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

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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