



# **Product Conversion Application Form**

This form is only to be used by mortgage intermediaries who advised the customer/s when arranging their current rate/package.

How to complete the fo	orm													
<b>1</b> Customer/s details (KYC required)	2 Product Transfer. details completed Intermediary	d by	<b>3</b> <sup>C</sup>	Current Informa omplet	Mortg ition ted by i	age AIB	4 Internal Use Only							
Intermediary Details														
Advisor Name														
FCA Number														
Intermediary Firm														
Principal Name														
Are you charging a broker fee for this mortgage?	Yes	No												
Amount														

## Section 1: Customer/s Details (Updated KYC Requirements)

### **Customer Name: Applicant 1**

Customer Name: Applicant 1	Customer Name: Applicant 2
Salutation	Salutation
Forename	Forename
Surname	Surname
D.O.B.	D.O.B.
Number of dependants	Number of dependants
(and ages if applicable)	(and ages if applicable)
Moblie No.	Moblie No.
Email	Email

### Current AIB (NI) Mortgage Account No.

Property Address (Security Address)

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

ess)													
ny)													

### **Intermediary Confirmation of Authority**

By ticking this box, I confirm that I have the consent of the named customer/s to receive information relating to their mortgage and that I have provided the named customer/s with the AIB (NI) Data Protection Notice.

### Section 2: Product Transfer Details (to be completed by Intermediary)

#### **Product Transfer Details**

To transfer the above AIB (NI) Mortgage account number (section	1):
Fixed Rate Mortgage	Discount Variable Rate Mortgage
Rate	Rate
End Date	End Date
Day Month Year	Day Month Year
Co-ownership	
Rate	
End Date Day Month Year	

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

I understand that you will issue a Product Transfer Letter which will provide full details of the new mortgage product.

I confirm that I have explained that this will not take place until a signed Letter of Offer has been returned. Failure to provide this could result in reverting to a higher interest rate.

I understand and explained to the customer/s that the Product Transfer will not take place until the date that the current fixed rate period ends.

I confirm there is no material impact to affordability.

By ticking this box	I confirm the above statements to be true and I have the authority to submit a Product Transfer application on
the customer/s beh	half.

## Section 3: Current Mortgage Information (to be completed by AIB (NI))

### Current AIB (NI) Mortgage Details

Current AIB (NI) Mortage Account Number								
Mortgage Type (Fixed/Variable)								
Current Product Expiry								
Mortgage Term								
Indexed Valuation								
Confirmed By								

Staff Name	DCA Level

Lending criteria, terms and conditions apply.

### Section 4: Internal Use Only (to be completed by AIB (NI))

#### **Conversion Details**

Part A	
Balance Outstanding	
Arrangement/Booking Fee	Add fee to loan? Yes No
Initial Rate Type	
Initial Rate Pay	For (Months)
Revert to Pay Rate	For (Months)
Part B	
Balance Outstanding	
Arrangement/Booking Fee	Add fee to loan? Yes No
Initial Rate Type	
Initial Rate Pay	For (Months)

### Additional Security

Please indicate any additional security to be included in the Letter of Offer, together with solicitor's details if applicable																			
Date to be converted																			

### Additional Information

Sector Code											
Credit Grade											

#### Information correct as at November 2023

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