



Term Amendment Application Form

Prior to completion of this form, Mortgage Intermediary should have requested and received the customer(s) mortgage information to ensure appropriate product is selected.

How to complete the form

- 1 Provide Customer with AIB DPN and privacy notice
- 2 Complete all sections of this form fully
- 3 Both Broker and Customer to sign
- 4 Attach supporting documents and email to broker.offers@aib.ie

Intermediary Details

Advisor Name	<input type="text"/>
FCA Number	<input type="text"/>
Intermediary Firm	<input type="text"/>
Principal Name	<input type="text"/>
Are you charging a broker fee for this mortgage?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Amount	<input type="text"/>

Section 1: Customer(s) Details (updated KYC requirements)

Customer Name: Applicant 1

Salutation	<input type="text"/>
Forename	<input type="text"/>
Surname	<input type="text"/>
D.O.B.	<input type="text"/>
Number of dependants	<input type="text"/>
(and ages if applicable)	<input type="text"/>
Moblie No.	<input type="text"/>
Email	<input type="text"/>

Customer Name: Applicant 2

Salutation	<input type="text"/>
Forename	<input type="text"/>
Surname	<input type="text"/>
D.O.B.	<input type="text"/>
Number of dependants	<input type="text"/>
(and ages if applicable)	<input type="text"/>
Moblie No.	<input type="text"/>
Email	<input type="text"/>

Current AIB (NI) Mortgage Account No.

Employment Details

Applicant 1

Employers Name	<input type="text"/>
Occupation	<input type="text"/>
Length of Service	<input type="text"/> Years <input type="text"/> Months

Employment Details

Applicant 2

Employers Name

Occupation

Length of Service

Years

Months

Property Address

Property Address (Security Address)

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

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

Product Transfer Details

To transfer the above AIB (NI) Mortgage account number (section 1):

Part 1

Fixed Rate Mortgage

Rate

Discount Variable Rate Mortgage

Rate

Fixed Rate End Date

Day

Month

Year

Any change in Mortgage Term

Term is increasing

Term is reducing

Original Term

Year(s)

Month(s)

New Advised Term

Year(s)

Month(s)

*Please note AIB (NI) maximum term rule applies.

Part 2

Fixed Rate Mortgage

Rate

Discount Variable Rate Mortgage

Rate

Fixed Rate End Date

Day

Month

Year

Any change in Mortgage Term

Term is increasing

Term is reducing

Original Term

Year(s)

Month(s)

New Advised Term

Year(s)

Month(s)

*Please note AIB (NI) maximum term rule applies.

To transfer the above AIB (NI) Mortgage account number (section 1):

Fixed Rate Mortgage

Rate

Discount Variable Rate Mortgage

Rate

Fixed Rate End Date

Day Month Year

Term is increasing

Term is reducing ☐

Original Term Year(s) / Month(s)

New Advised Term Year(s) Month(s)

*Please note AIB (NI) maximum term rule applies.

Fixed Rate Mortgage

Rate

Discount Variable Rate Mortgage

Rate

Fixed Rate End Date

Day Month Year

Term is increasing ☐

Term is reducing ☐

Original Term Year(s) Month(s)

New Advised Term Year(s) Month(s)

*Please note AIB (NI) maximum term rule applies.

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 behalf.

By signing 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.

Mortgage Adviser Name

Date / /

Signature



AIB for Intermediaries Declaration and Sign-offs

From time to time, AIB Group would like to tell you about offers, products and services available from us and carefully selected third parties. Please tell us below if you are happy for us to contact you, and by which methods. If you later decide to change these preferences, you may contact us at any time.

Customer 1 : By phone Yes ☐ No ☐ By post Yes ☐ No ☐ By email Yes ☐ No ☐
Customer 2 : By phone Yes ☐ No ☐ By post Yes ☐ No ☐ By email Yes ☐ No ☐

MORTGAGE APPLICATION /DECLARATION

- I/We hereby apply for a mortgage advance as detailed in my/our application form. I/we accept that the advance, if approved, will be subject to AIB (NI)'s (the Bank's) usual terms and conditions and to any Special Conditions which might be set by the Bank.
- I/We confirm instruction to contact me/us to collect payment details for the fees outlined during the application process (if applicable), payable to the Bank.
 - I/We instruct you to obtain a Report and Valuation for mortgage purposes. I/We understand that there will be no refund of the valuation fee once instructions have been given to an independent firm of surveyors/valuers. I/We accept that neither the Bank nor the valuer will be responsible to me/us or any other person for the contents or adequacy of the valuation report or the value or condition of the property.
 - I/We acknowledge that where an application (arrangement) fee is applicable, if the mortgage offer is withdrawn following payment of the fee, the application (arrangement) fee will be refunded to me/us.
 - I/We acknowledge that where a booking fee is applicable on a fixed rate mortgage, the booking fee will not be refunded to me/us in any circumstances.
- For Self-Build Applications:
 - I/We acknowledge that AIB (NI) will appoint a specialist to review and report to the Bank on my/our self-build project (the "Self-Build Specialist")
 - I/We understand that AIB (NI) will be responsible for any fees, expenses or disbursements incurred by the Self-Build Specialist in their production of a report which is satisfactory to the Bank.
 - I/We understand that in the event that the Self Build Specialist requires additional information to complete their report, I/we will be responsible for the costs of procuring any such information.
 - I/We will liaise and co-operate fully with the Self-Build Specialist providing all such information as is required by the Self-Build Specialist.
 - I/We acknowledge that any mortgage offer will be subject to the General Conditions of Offer of Mortgage together with the Special Conditions, a copy of which will be provided with any mortgage offer made by AIB (NI).
 - I/We acknowledge that any mortgage advance will be subject to the additional general and specific AIB (NI) terms and conditions of mortgage as determined by the Bank.
- I/We authorise you and your agents to make any enquiries you deem necessary for confirmation of the particulars detailed in my/our mortgage application and for credit reference purposes. I/We permit any third party from whom information is sought to release information about me/us to the Bank.
- I/We hereby acknowledge and confirm that the Bank may from time to time transfer or assign any loan, mortgage, policy or policies of assurance and other related security (or any one of them) to any company or person (including but not limited to any of its subsidiaries) without any notice to me/us. I/We hereby consent to each such transfer or assignment.
- I/We warrant that the information disclosed in my/our application form is accurate and complete in every respect. I/We confirm that I/we have never been bankrupt or had a Court Order for non-payment of a debt made against me/us. I/We will notify the Bank of any change in this information before any advance is made.
- Dispensing Notice – I/We understand that for applications where joint applicants have different current address details, the Bank will send all documentation relating to your mortgage to the correspondence address of each applicant.
- In connection with my/our mortgage application, I/we request and authorise AIB (NI) to provide a copy of the Letter of Offer to our Intermediary.
- I have read and understood the AIB Group (UK) p.l.c. Data Protection Notice.

Signature of 1st Customer

Print name

Date Day / Month / Year

I confirm that:

- All documents enclosed are true copies of the originals; and
- I have read, accept and agree to be bound by the AIB Mortgage Intermediary Terms of Business.
- When providing us with any information (including personal data) relating to identifiable living individuals you will have ensured that those individuals have consented, to the extent that it is required, to providing us with their information or that another lawful basis for the processing of their information has been established and that those individuals are aware of our identity and of our Data Protection Notice.

Intermediary signature

Print name

Signature of 2nd Customer

Print name

Date Day / Month / Year

Firm Name

Date Day / Month / Year