



# Change of mortgage details form

If you wish to change any details in your mortgage application before completion, fill in the appropriate information below. Please note that some changes may incur a charge.

If you wish to change your mortgage product, for example between Lifetime mortgage products, or from a 100%+ mortgage to a Standard mortgage, a new application is required.

**SECTIONS A & B ARE MANDATORY AND MUST BE COMPLETED.**

<b>A Personal details</b>	Mortgage Express application number:													
	(Please ensure you complete all fields in Section A)	<table border="1"> <thead> <tr> <th>1<sup>st</sup> applicant/Director of Ltd Co. (Applicant with highest income)</th> <th>2<sup>nd</sup> applicant/Director of Ltd Co.</th> </tr> </thead> <tbody> <tr> <td>First names</td> <td>First names</td> </tr> <tr> <td>Surname</td> <td>Surname</td> </tr> <tr> <td>Date of birth</td> <td>Date of birth</td> </tr> <tr> <td colspan="2">Address of property to be mortgaged</td> </tr> <tr> <td colspan="2">Postcode</td> </tr> </tbody> </table>	1 <sup>st</sup> applicant/Director of Ltd Co. (Applicant with highest income)	2 <sup>nd</sup> applicant/Director of Ltd Co.	First names	First names	Surname	Surname	Date of birth	Date of birth	Address of property to be mortgaged		Postcode	
		1 <sup>st</sup> applicant/Director of Ltd Co. (Applicant with highest income)	2 <sup>nd</sup> applicant/Director of Ltd Co.											
		First names	First names											
		Surname	Surname											
		Date of birth	Date of birth											
Address of property to be mortgaged														
Postcode														
<b>B Broker details (if applicable)</b>	Company name	Contact name												
	Telephone no. (inc STD Code)													
	Level of service provided to the customer?      Advised <input type="checkbox"/> Non-advised <input type="checkbox"/>													
	Broker fee (This covers all fees charged by the broker for arranging the mortgage)	£												
	Your FSA or NACFB number	Directly Authorised <input type="checkbox"/> Appointed Rep <input type="checkbox"/> NACFB <input type="checkbox"/> Name of Principal <input type="text"/>												
<b>C Mortgage change</b>	You are entitled to change the following mortgage details: rate; term; loan; repayment method. If you are changing the property to be mortgaged, you will need to make a new application.													
	<b>Ca Rate switch</b> <input type="checkbox"/>	Fee* £ <input type="text"/> Add to Loan <input type="checkbox"/> Pay by Cheque† <input type="checkbox"/> (Please tick appropriate box) <b>New interest rate:</b> Normal variable rate <input type="text"/> %      Discount of <input type="text"/> % for <input type="text"/> years Fixed rate at <input type="text"/> % until <input type="text"/> Other <input type="text"/> Distribution network (The network through which the rate is available) <input type="text"/>												
<b>Cb Term change</b> <input type="checkbox"/>	New term required <input type="text"/> years													

(Not applicable for Lifetime mortgage)

\* Fee of 0.2% is applied if switching between fixed rates after the property has been valued but the mortgage has not completed. This fee is not applicable if switching between fixed rates launched in the same range.

† If cheque not received by completion date, amount will be deducted from advance.



# Change of mortgage details form continued

<b>Cc</b> Loan change <input type="checkbox"/>	New loan required £ <input type="text"/> Purchase price/Property value £ <input type="text"/>
<p><b>Lifetime mortgages only:</b>                  This is the extra amount you would like to borrow in the first 12 months of the mortgage. If you did not enter an amount in your application and do not enter an amount now, you will not be able to drawdown any additional funds within the first 12 months of the mortgage.</p>	
Drawdown required or change in drawdown <input type="checkbox"/> Amount of drawdown £ <input type="text"/>	

<b>Cd</b> Repayment method <input type="checkbox"/>	New repayment method (please note part interest/part repayment mortgages are NOT permitted).	
(Not applicable for Lifetime mortgage)	Repayment <input type="checkbox"/>	Interest only <input type="checkbox"/>
	Interest only – Endowment backed <input type="checkbox"/>	Interest only – PEP/Pension/ISA backed <input type="checkbox"/>

<b>D</b> Additional information	Please use the space below if there are any other detail changes we need to be made aware of (eg. change in Broker address):

## E Declaration

1. The details provided in this change of details form supersede any details given in **my/our** original application.
2. This change of details form, forms part of **my/our** original application.
3. The information in this change of details form is true, accurate and complete, and if it is not **I/we** will immediately notify **you** in writing.
4. Should the loan be made, all the information **I/we** have given to **you** in this change of details form will form part of the terms of the loan contract.
5. **I/We** have read any answers that have been completed by anyone else or anyone else completing this form has **my/our** irrevocable authority as given in the declaration of **my/our** original application.
6. If the loan is to be regulated by the FSA, **I/we** have received a new Key Facts Illustration.

**Introducer's Declaration where completing on borrowers behalf (this is not acceptable for Limited Company changes, in this instance all directors of the company must sign this form).**

Where completed by any introducer named in this form, **I/we** can confirm that **I/we** have made **my/our** client(s) aware of the above declaration and that consent has been obtained from **my/our** clients for **me/us** to make this/these representation on **my/our** clients behalf. **I/We** also confirm where appropriate **I/we** have followed a fully compliant Financial Services Authority compliant sales process.

Introducer/1 <sup>st</sup> applicant/Director of Ltd Co. (Applicant with highest income)
Signature
Print Name
If introducer is signing, please state position in firm.
Date

Introducer/2 <sup>nd</sup> applicant/Director of Ltd Co.
Signature
Print Name
If introducer is signing, please state position in firm.
Date

**This form must be signed and dated for us to be able to proceed with the application.**