

CONSENT TO RELEASE INFORMATION & PRODUCT SWITCH SUBMISSION FORM



Please complete and return this form to our, 'Customer Services - Mortgages' team via our Secure Document Upload facility – familybuildingsociety.co.uk/contact-us/secure-document-upload
Without this fully completed form, we'll be unable to progress your request further.

Once the form is successfully completed and received by us, we'll aim to process your request within three working days.

PLEASE USE CAPITAL LETTERS THROUGHOUT

CUSTOMER MORTGAGE ACCOUNT INFORMATION

ACCOUNT NUMBER:	<input type="text"/>
SECURITY ADDRESS:	<input type="text"/>
FIRST CUSTOMER'S NAME:	<input type="text"/>
PHONE:	<input type="text"/>
EMAIL ADDRESS:	<input type="text"/>
SECOND CUSTOMER'S NAME:	<input type="text"/>
PHONE:	<input type="text"/>
EMAIL ADDRESS:	<input type="text"/>

CUSTOMER DECLARATION

I / We agree to you providing all information about my/our mortgage account to the mortgage intermediary named below.
Signed in ink by all mortgage account holders:

FIRST CUSTOMER	SIGNED:	<input type="text"/>	DATE:	<input type="text"/>	<input type="text"/>	<input type="text"/>
SECOND CUSTOMER	SIGNED:	<input type="text"/>	DATE:	<input type="text"/>	<input type="text"/>	<input type="text"/>

INTERMEDIARY DETAILS

ADVISER'S NAME:	<input type="text"/>		
EMAIL:	<input type="text"/>		
FCA NUMBER:	<input type="text"/>	PHONE:	<input type="text"/>
OTHER AUTHORISED ADVISERS / ASSISTANTS WHO CAN CONTACT THE SOCIETY FOR UPDATES ON THIS REQUEST:	<input type="text"/>		
COMPANY NAME:	<input type="text"/>		
BUSINESS ADDRESS:	<input type="text"/>		

PRODUCT SWITCH* FURTHER ADVANCE PORTING OTHER, PLEASE SPECIFY:

*Please ensure that you also complete the rest of the form over the page.

FOR PRODUCT SWITCHES ONLY, PLEASE COMPLETE THE BELOW SECTIONS:

INDICATE WHICH OF THE SOCIETY'S MORTGAGE PRODUCTS YOU ARE APPLYING FOR. PLEASE GIVE CODE:

NAME OF PRINCIPAL IF FIRM NOT DIRECTLY AUTHORISED:

PRINCIPAL'S ADDRESS:

PRINCIPAL'S FCA NO:

PROC FEE PAYMENT DETAILS FOR THIS PRODUCT SWITCH:

Please note, if the application is being submitted via a network or mortgage club, you should provide their bank details. If you are not Directly Authorised, then please provide the Principal's bank details here.

PLEASE TICK HERE IF THE APPLICATION IS THROUGH A MORTGAGE CLUB:

MORTGAGE CLUB NAME:

ACCOUNT NAME:

SORT CODE:

ACCOUNT NUMBER:

IF YOU ARE CHARGING THE BORROWER A FEE FOR YOUR SERVICE:

HOW MUCH IS YOUR FEE?

£

IS YOUR FEE REFUNDABLE?

YES

NO

WHEN IS THE FEE TO BE PAID?

ON APPLICATION

ON COMPLETION

BORROWER'S ACCOUNT NO:

INTERMEDIARY DECLARATION

I confirm that I am authorised to act on behalf of the named customer(s) above relating to this particular enquiry and I am acting within my authority. The information will only be used in conjunction with the needs of the customers. I accept responsibility for the security of any information provided to me.

For product switches and other information purposes, I understand this agreement finishes six months from the enquiry date or once the product switch has been completed, whichever is sooner.

For porting and further advance purposes, I understand this agreement is solely for this purpose and will cease after this matter has been completed or after one year from the enquiry date, whichever is sooner.

I confirm that the information given above is correct and that any third party who advised on this product switch / porting / further advance is either authorised by the Financial Conduct Authority to arrange, advise on or introduce mortgages as appropriate, or is exempt from authorisation. Based on my knowledge of the customer, the product switch / porting / further advance is suitable for this customer.

All mortgage variation requests submitted by intermediaries are subject to the Society's Terms of Business, which can be found on our About and Fees page of our website. I confirm that I have read and understood the Society's Terms of Business and that I agree to be bound by them.

SIGNATURE:

DATE:

DD

MM

YYYY

If you need this document in an alternative format please call us on **03330 140146**.

To find out more, please contact our New Business Team:



familybuildingsociety.co.uk



03330 140146



mortgage.service@familybsoc.co.uk

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Family Building Society is a trading name of National Counties Building Society which is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

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register.fca.org.uk