CONSENT TO RELEASE INFORMATION & PRODUCT SWITCH SUBMISSION FORM

THE FAMILY BUILDING SOCIETY

Please complete and return this form to our, 'Customer Services - Mortgages' team via our Secure Document Upload facility – *familybuildingsociety.co.uk/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:	
SECURITY ADDRESS:	
FIRST CUSTOMER'S NAME:	
PHONE:	
EMAIL ADDRESS:	
SECOND CUSTOMER'S NAME:	
PHONE:	
EMAIL ADDRESS:	

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:		DATE:	DD	MM	YYYY
SECOND CUSTOMER	SIGNED:		DATE:	DD	MM	YYYY

IMPORTANT - THIS FORM HAS TWO PAGES
The declaration on the reverse of this form must be signed for all requests. For Product Switch requests, Page two must also be completed and submitted. Requests may be delayed if any required information, pages, or signatures are missing.

INTERMEDIARY DETAILS

ADVISER'S NAME:			
EMAIL:			
FCA NUMBER:		PHONE:	
OTHER AUTHORISED ADVISERS / ASSISTANTS WHO CAN CONTACT THE SOCIETY FOR UPDATES ON THIS REQUEST:			
COMPANY NAME:			
BUSINESS ADDRESS:			

☐ 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 SECTIONS BELOW:

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 NUMBER:	

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

EBBISHAM HOUSE
30 CHURCH STREET
EPSOM
SURREY
KT17 4NL

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.

Firm Reference No.206080
register.fca.org.uk