

Use this form if:

- Your client is not changing the amount or the term of the mortgage
- We have not been asked to grant a consent to lease the mortgaged premises

Client Details

Customer Name	
Address of mortgaged property:	
Account number:	

Product choice (please tick the product that your client has selected)

The customer wants to transfer the above numbered mortgage to the following product:

A Fixed Rate Mortgage	<input type="checkbox"/> 2 year	Rate:
	<input type="checkbox"/> 3 year	Rate:
	<input type="checkbox"/> 5 year	Rate:
A Base Rate Tracker Mortgage	<input type="checkbox"/>	Rate:

Please contact us and we will advise you of the property valuation we hold on our system

**Broker Statement**

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

I understand that you will issue a Product Transfer Offer Letter and Product Transfer Illustration which will provide full details of the new mortgage product including the rate of interest that will apply. The rate of interest will be the rate that applies at the date the offer is issued.

I understand that the Product Transfer will not take place until the date that the current fixed rate period ends.

Signed:

Broker Name:

Date:

**Broker Details**

Firm Reference number	
Intermediary Company	
Advisor Name	
Advisor Code	
Are you charging a broker fee for this mortgage	
If yes, confirm the amount £	