

Please read the below carefully and choose the option of how to proceed that is right for you. If you wish to proceed on an execution-only basis, please complete the details on this and the Instruction of Advice and return the form to us. If you wish to take advice you should speak to your adviser first and after discussing it with you, they will then contact us on your behalf.

Using your own adviser Your adviser will explain what advice options are available to you. If advice is limited to this transaction only, they can help you decide if this is right for you.
If advice is not limited, you will receive advice related to all other options available to you along with the broader implications of transferring your loan to move into another property (for example, potential implications to your state benefit entitlement or your estate).
Your adviser will tell you whether you have to pay for their advice.

Execution only Hodge will act solely on your instructions. You won't receive any advice and/or a personal recommendation from us as to whether the mortgage meets your specific requirements. We won't be obliged to and won't assess the suitability of this mortgage to your individual needs and circumstances. You would be waiving any protections that the Financial Conduct Authority's regulations on mortgage suitability would bring to you. There aren't any advice fees associated with an Execution only sale.

Account Details

Plan/Account Number (must be completed)

Personal Details

Applicant 1

Full name (including title)

Applicant 2

Full name (including title)

Property Details

Address of the property you wish to purchase

Property address

Postcode Purchase price £

Will anyone else occupy the property? Y N

If YES, please provide details

About the Property You Wish to Purchase

The property you wish to purchase must be suitable for the plan. Please complete this section as fully as possible, to ensure that any issues that could affect your application are identified early. Once you have submitted this application, we will instruct a surveyor to visit the property to value it.

Commercial property, park homes and non traditional concrete/steel framed dwellings are not acceptable. If you are unsure about the eligibility of the property, please contact us for assistance.

Tenure

Type Freehold Leasehold Commonhold Absolute

If leasehold, remaining term years

Annual service charge £

How is the title held? In one name As beneficial joint tenants As tenants in common

Property type

Select property type House Bungalow Flat/Maisonette

If house or bungalow Detached Semi-detached Terraced/Linked

If flat/maisonette On what floor is it? Number of floors in block

Is there a lift? Y N

Property information

Number of bedrooms

Age of property years

Date purchased

Construction

External walls Brick Stone Timber frame

Roof Tile Slate Other

If timber frame, is the outer wall brick, block or stone? Y N

If flat roof, approx. % of total roof area %

New builds

Is this a newly built property?

 Y N

If yes, is the property fully completed and habitable?

 Y N

If yes, does it have an NHBC or similar warranty?

 Y N

If it is a flat, is the whole block fully completed?
(including all other flats and communal areas)

 Y N

Other factors

Is the property the applicant's main residence?

 Y N

Is the property located in England, Wales or mainland Scotland?

 Y N

Was the property previously owned by the public sector?
(i.e. Council, Housing Association or MoD)

 Y N

Is the property situated over, or in close proximity to, retail or
business premises?

 Y N

Is the property part of a sheltered housing development?

 Y N

Do any age restrictions apply to the property?

 Y N

Is the property used for any form of business/commercial activity?

 Y N

Is the property listed?

 Y Grade of listing N

Does the property have more than 10 acres of land?

 Y N

Are there any agricultural ties or restrictions on the property?

 Y N

Has the property ever been flooded or is it at significant risk
of flooding?

 Y N

Has the property ever been subject to underpinning or major
structural repair?

 Y N

Is the property held in trust?

 Y N

Has the property had solar panels fitted?

 Y N

If yes, are they owned outright or subject to a lease?

Owned outright Subject to a lease

Solicitor Details

You must appoint your own solicitor to act for you in the purchase of your new property. They will undertake the conveyancing for you and liaise with our solicitor to arrange for your plan to be transferred to the new property.

Company name

Name of solicitor
acting for you

Address

Telephone

Email

DX

Access to the Property to be Mortgaged

Please provide details of the estate agent who is selling the property you wish to purchase. If there is no estate agent, please provide the vendor details.

Company name

Name of
estate agent

Address

Telephone

Email

Declaration

I understand, confirm and agree the following:

Use of your Personal Data

- Where applicable, I enclose payment in order for a Chartered Surveyor to value the property that the additional borrower will occupy. I understand that this fee is not refundable even if the property does not meet the eligibility criteria. Payment of this fee does not mean that Hodge is obliged to accept my application.
- I understand that the valuation undertaken is a limited inspection for Hodge Lifetime's purposes only and it is possible that it may not reveal important defects in the property. If I wish to satisfy myself as to the condition of the property then I understand that I should obtain a more detailed or structural survey. Where a person is added to the mortgage contract they will become a joint borrower with me. This means both of us have to comply with the terms of the mortgage agreement.
- I have a right to withdraw from this adding a person to the existing mortgage contract at any time before it is complete. However, if I withdraw, I will not receive a refund of any fees I have paid to Hodge Lifetime, and I may still be required to pay my financial adviser and solicitor, and Hodge Lifetime's solicitor, for the work they have undertaken on my behalf.
- All the details in this application are, to the best of my knowledge and belief, true and complete. If Hodge finds any to be untrue, it could affect my eligibility to add a person to the existing mortgage contract.
- I understand that if I proceed on an execution-only basis:
 - Hodge will act solely on my instructions.
 - Hodge will not provide me with advice and will not assess the suitability of the transaction for me.
 - I will not benefit from the same protection I would get if I had taken advice.

Your rights as a data subject

- The personal details you give on this form will be subject to the provisions of the General Data Protection Regulations 2018.
- The information will be retained only for as long as necessary in accordance with our Retention Policy by Hodge who is the data controller, and may be stored on paper or an electronic format.

The information held about you may be used for the following purposes:

- Administering your application;
- Verifying your identity and anti-money laundering checks;
- Assist in fraud prevention;
- Reporting to regulators and authorities;
- Market and product analysis.

The information held about you may be shared with the following parties:

- Hodge Lifetime's approved service providers in relation to this application;
- Other members of Hodge Lifetime's group, its subsidiaries and associated companies;
- Regulators or authorities where required or permitted by law
- You have the right to request access to your personal information held by Hodge; to do so, this request must be made in writing using our Subject Access Request Process. Further information regarding this can be found on our website.
- Telephone calls may be monitored and/or recorded in the interest of security and to help improve our service.
- Hodge may also use your information to contact you about its products and services that it believes may be of interest to you.
- Occasionally, we may have products and services that could be suitable for you. We would like your permission to contact you by phone, post, SMS or email.

Please confirm if you would like to hear from us about these services:

Applicant 1

- By Phone
- By Mail
- By Email
- By SMS

Applicant 2

- By Phone
- By Mail
- By Email
- By SMS

We will always treat your personal details with the utmost care and will never pass or sell your information to other companies for marketing purposes.

Declaration

Your Rights as a Data Subject

At any point while we are in possession of or processing your personal data, you have the following rights:

Right of access – you have the right to request a copy of the information that we hold about you as mentioned above.

Right of rectification – you have a right to correct data that we hold about you that is inaccurate or incomplete.

Right to be forgotten – in certain circumstances you can ask for the data we hold about you to be erased from our records.

- **Right to restriction of processing** – where certain conditions apply you have a right to restrict the processing.
- **Right of portability** – in certain circumstances, you have the right to have the data we hold about you transferred to another organisation.
- **Right to object** – you have the right to object to certain types of processing such as direct marketing.
- **Right to object to automated processing, including profiling** – protection against targeted marketing and decision making
- **Right to judicial review** - in the event that We refuse your request under rights of access, we will provide you with a reason as to why. You have the right to complain as per the subject access request process.
- **All of the above** requests will be forwarded on should there be a third party involved in the processing of your personal data, i.e. if a data subject was to raise a Subject Access Request.

I agree to the Terms and Conditions of the account. I have read and understood the Use of Your Personal Data declaration and consent to the use of my information for the purposes stated. I declare that the information that I have provided is correct to the best of my knowledge and belief

Applicant 1

Signed

Print name

D

D

M

M

Y

Y

Date

Applicant 2

Signed

Print name

D

D

M

M

Y

Y

Date

I agree to the Terms and Conditions of the account. I have read and understood the Use of Your Personal Data declaration and consent to the use of my information for the purposes stated. I declare that the information that I have provided is correct to the best of my knowledge and belief.

Adviser Declaration

Company name

Name of
Adviser/
Supervisor

Address

Telephone

Email

FCA firm
reference number

Your firm

If relevant, your principle/network

Date of advice

Mortgage Club and/or
Network (if applicable)

Broker Fee
(if applicable)

Declaration

I confirm that I have provided/supervised* the advice and recommendation with regard to the transfer of this mortgage to another property (* delete as appropriate)

Signed

Print name

Date

Only complete this page if advice is being provided in relation to this application.

Please post this application and all supporting documents to:
Hodge, Application Administration, One Central Square, Cardiff CF10 1FS.



0800 138 9109



mortgages@hodge.co.uk



Customers: [hodgebank.co.uk](https://www.hodgebank.co.uk)

Advisers: [hodgebank.co.uk/intermediaries](https://www.hodgebank.co.uk/intermediaries)