

**This form is for adviser use only.**

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## Account Details

Plan/Account Number  
(must be completed)

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## Personal Details

### Applicant 1

Full name  
(including title)

Contact number

### Applicant 2

Full name  
(including title)

Contact number

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## Property Details

### Address of the property you wish to purchase

Property address

Postcode

Purchase price

£

Will anyone else  
occupy the property?

If YES, please  
provide details

Do you intend to complete on the purchase of your new  
property and the sale of your existing property on the  
same day?

If NO, please contact us at  
[contractvariations@hodge.co.uk](mailto:contractvariations@hodge.co.uk)

## 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

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## Repayment Strategy (50+ Mortgage Only - please complete the following)

Loan term  Years

Property details  Cashing in existing investments  Downsizing  
 Cashing in an endowment policy  Sale of other property

If more than one strategy has been selected, please provide details of the value attaching to each strategy in the additional info section.

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## Solicitor Details

If you have a 50+, Retirement Interest Only, or Hodge Resi mortgage you can choose Joint representation to use our solicitors to act on your behalf, or you can choose Separate representation and choose to instruct your own solicitor.

If you instruct your own solicitor, Hodge will instruct our own solicitor to act on our behalf.

For all products you will incur the cost of both our and your solicitor.

If you have chosen separate representation please complete your solicitors details below and they will undertake the conveyancing for you and liaise with our solicitor to arrange for your plan to be transferred to the new property.

Joint representation  Separate representation

Company name

Name of solicitor acting for you

Address

Telephone

Email

DX

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## 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'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, and I may still be required to pay my financial adviser and solicitor, and Hodge'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's approved service providers in relation to this application
- Other members of Hodge'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.

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## 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

## Adviser Declaration

Before submitting business to us you must register through our online portal. Registration is quick and simple and can be found on our intermediary website at the following link:

[hodgebank.co.uk/intermediaries/registration](http://hodgebank.co.uk/intermediaries/registration)

Company name	<input type="text"/>	Name of Adviser/Supervisor	<input type="text"/>
Address	<input type="text"/>	Telephone	<input type="text"/>
		Email	<input type="text"/>
FCA firm reference number	Your firm <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	If relevant, your principle/network	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Date of advice	<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y		
Mortgage Club and/or Network (if applicable)	<input type="text"/>	Broker Fee (if applicable)	<input type="text"/>

If you are Directly Authorised please state which Club you would like to use as your payment route:

If you feel that your customer needs additional support for specific needs, or your customer has experienced a sudden change in circumstances, we're here to help. To make managing your customers' mortgage straightforward, we'll do our best to tailor our service to suit you. Please provide details in the box below.

### 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).

Print name

Signed

DDMMYY

Date

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



0800 138 9109



[contractvariations@hodge.co.uk](mailto:contractvariations@hodge.co.uk)



[hodgebank.co.uk/intermediaries](http://hodgebank.co.uk/intermediaries)