

**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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**Existing Holiday Buy to Let Mortgage Details (if applicable)**

Current lender

Balance outstanding

£

Will this mortgage be repaid on completion?

Contractual monthly payment

£



If not being redeemed, please provide further details



## Property information

Number of bedrooms

Age of property

 years

Date purchased

Annual service charge

 £

## 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

## Multi Units

Does this property have multiple units?

 Y N

Description of units?

Do any units share facilities?

 Y N

If Yes, please give details

## Other factors

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

 Y  N

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

 Y  N

Does the property have more than 20 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

## 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 vendor details.

Company name

Name of estate agent

Address

Telephone

Email

## Holiday Buy To Let Rental Income

Low season weekly rental income

 £

Mid season weekly rental income

 £

High season weekly rental income

 £

## Loan Requirements

Purchase price

 £

Loan amount required

 £

## Property Details Update

If you are adding a new applicant onto your mortgage we may require further documents. We will contact you to confirm what documents are necessary once we have reviewed the application.

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## Existing Holiday Buy to Let Mortgage Details (if applicable)

Current lender	<input type="text"/>	
Balance outstanding	£ <input type="text"/>	Will this mortgage be repaid on completion?
Contractual monthly payment	£ <input type="text"/>	<input type="checkbox"/> Y <input type="checkbox"/> N
If not being redeemed, please provide further details	<input type="text"/>	

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## Holiday Buy To Let Rental Income

Low season weekly rental income	£ <input type="text"/>
Mid season weekly rental income	£ <input type="text"/>
High season weekly rental income	£ <input type="text"/>

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## Your Mortgage Repayment Strategy

The applicant must have in place a suitable strategy for repaying the loan at the end of the term. You can use more than one repayment strategy.

What is the applicant's current plan at the end of the mortgage term?	<input type="checkbox"/> Investments	<input type="checkbox"/> Property	<input type="checkbox"/> Stocks & shares	<input type="checkbox"/> Other
	<input type="checkbox"/> Savings	£ <input type="text"/>		
	<input type="checkbox"/> Selling property			
	<input type="checkbox"/> Other (please specify)			
	<input type="text"/>			



## 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.

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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



## Declaration

### Advisor 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	<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:

### 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)

<input type="text"/> Signed	<input type="text"/> Print name
<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y	
Date	

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

### Supporting Information (Adviser use only)

Application form	<input type="checkbox"/>	Have both applicants signed and dated the declaration in the Declaration section?
Direct Debit form signed and dated	<input type="checkbox"/>	



0800 138 9109



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

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