

Rate switch products can be viewed at: hodgebank.co.uk/intermediaries/product-rates – rate switch requests can only be requested by registered intermediaries.

Intermediary registration forms can be found at hodgebank.co.uk/intermediaries/registration

If you have any queries regarding registration, Please contact us on **0800 138 9109** or **retentionsupport@hodge.co.uk**

Rate Switch Details

	Customer 1	Customer 2
Customer name	<input type="text"/>	<input type="text"/>
Customer email <small>(Electronic Signature only)</small>	<input type="text"/>	<input type="text"/>
Security Address	<input type="text"/>	<input type="text"/>
	Postcode	
Customer's current product <small>(50+/RIO/Retirement Mortgage/Holiday Let)</small>	<input type="text"/>	
Account number	<input type="text"/>	Current product expiry date <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
New product code	<input type="text"/>	
Product fee	£ <input type="text"/>	
	<input type="checkbox"/> Add to loan	<input type="checkbox"/> Pay upfront
Name of intermediary	<input type="text"/>	
Company name and address	<input type="text"/>	
	Postcode	
FCA Reference number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	Your firm	If relevant, your principle/network
Intermediary fee <small>(if applicable)</small>	£ <input type="text"/>	
Payment club/network	<input type="text"/>	
If you are Directly Authorised please state which Club you would like to use as your payment route:		
<input type="text"/>		

I can confirm that I have authorisation from the customer(s) to obtain data on their behalf and confirm that advice and recommendation has been given in respect of the rate switch request. (please tick)

For Retirement Mortgage only – I confirm that I have passed an appropriate approved examining board's specialist examination in equity release and I have provided/supervised the equity release advice and recommendation. (please tick)

Date

 **0800 138 9109**
 **retentionsupport@hodge.co.uk**
 **hodgebank.co.uk/intermediaries**