## Intermediary Rate Switch Request Form



Rate switch products can be viewed at: <a href="https://hodgebank.co.uk/intermediaries/product-rates">hodgebank.co.uk/intermediaries/product-rates</a> rate switch requests can only be requested by registered intermediaries.

Intermediary registration forms can be found at <a href="https://hodgebank.co.uk/intermediaries/registration">hodgebank.co.uk/intermediaries/registration</a>

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   |   |
| Customer email (Electronic Signature only)  |   |
| Security Address  |   |
|   | Postcode  |
| Customer's current product (50+/RIO/Retirement Mortgage/Holiday Let)  |   |
| Account number  | Current product DDDMMYYY  |
| New product code  |   |
| Product fee   | 3   |
|   | Add to loan Pay upfront   |
| Name of intermediary  |   |
| Company name and address  |   |
|   | Postcode  |
| FCA Reference number  | Your firm  If relevant, your principle/network                  |
| Intermediary fee<br>(if applicable)   | £   |
| Payment club/network  |   |
| If you are Directly Authorised please   | e state which Club you would like to use as your payment route: |
|   |   |
| 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.                                |   |
| 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. |   |
| Signed  | Print name  D D M M Y Y  Date                                   |



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retentionsupport@hodge.co.uk



hodgebank.co.uk/intermediaries

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