

Quote Details/Loan Amount

Quotation Reference you'd like to proceed

Loan amount required £

Personal Details

Applicant 1

Full name (including title)

Marital status

Date of birth D D M M Y Y

Applicant 2

Full name (including title)

Marital status

Date of birth D D M M Y Y

Your address

Property address
Postcode

Telephone

Email

Does anyone else occupy the property? Y N If yes, please give further details

Will the home reversion plan be arranged on this property? Y N If no, please give further details

Is there any mortgage or any other charge against the property? Y N If so, please give the total amount outstanding and the name of lender(s)*

*The total must be less than the amount released unless repaid from your own resources.

About your property

Your property must be suitable for the home reversion 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.

If you are unsure about the eligibility of the property, please contact us for assistance.

Estimated property value

£

(over £1 million – refer)

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

Annual service charge

£

Construction

External walls	<input type="checkbox"/> Brick	<input type="checkbox"/> Stone	<input type="checkbox"/> Timber frame
Roof	<input type="checkbox"/> Tile	<input type="checkbox"/> Slate	<input type="checkbox"/> Other
If timber frame, is the outer wall brick, block or stone?	<input type="checkbox"/> Y	<input type="checkbox"/> N	
If flat roof, approx. % of total roof area	<input type="text" value=""/>		

Commercial property, park homes and non traditional concrete/steel framed dwellings are not acceptable. Please ask for advice if you are unsure about property eligibility.

Other factors

Will the property be your main residence?	<input type="checkbox"/> Y	<input type="checkbox"/> N	
Is the property located in England, Wales or mainland Scotland?	<input type="checkbox"/> Y	<input type="checkbox"/> N	
Was the property previously owned by the public sector (i.e. Council, Housing Association or MoD)?	<input type="checkbox"/> Y	<input type="checkbox"/> N	
Is the property situated over, or in close proximity to, retail or business premises?	<input type="checkbox"/> Y	<input type="checkbox"/> N	
Is the property part of a sheltered housing development?	<input type="checkbox"/> Y	<input type="checkbox"/> N	
Do any age restrictions apply to the property?	<input type="checkbox"/> Y	<input type="checkbox"/> N	
Is the property used for any form of business/commercial activity?	<input type="checkbox"/> Y	<input type="checkbox"/> N	
Is the property listed?	<input type="checkbox"/> Y	<input type="checkbox"/> N	Grade of listing <input type="text" value=""/>
Does the property have more than 10 acres of land?	<input type="checkbox"/> Y	<input type="checkbox"/> N	
Are there any agricultural ties or restrictions on the property?	<input type="checkbox"/> Y	<input type="checkbox"/> N	
Have there been any disputes regarding the boundaries/property?	<input type="checkbox"/> Y	<input type="checkbox"/> N	
Has the property ever been flooded or is it at significant risk of flooding?	<input type="checkbox"/> Y	<input type="checkbox"/> N	
Has the property ever been subject to underpinning or major structural repair?	<input type="checkbox"/> Y	<input type="checkbox"/> N	
Is the property held in trust?	<input type="checkbox"/> Y	<input type="checkbox"/> N	
Is the property in close proximity to high voltage overhead wires, pylons, electric substations or telephone masts?	<input type="checkbox"/> Y	<input type="checkbox"/> N	

New builds

Is this a newly built property?

If yes, is the property fully completed and habitable?

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

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

If you have ticked any of the shaded boxes, please provide further details to enable our underwriters to assess the eligibility of your property.

Your Solicitor

You must appoint your own solicitor to act for you. They will assist you in understanding the long term commitment you are taking on.

Company name

Name of solicitor
acting for you

Address

Telephone

Email

DX

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.

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.

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

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"/>

Declaration

I confirm that I have provided/supervised* the advice and recommendation with regard to the Shared Growth Option additional borrowing (*delete as appropriate).

I confirm that I hold the relevant Equity Release qualification to advise on the additional borrowing and have followed the Equity Release Council rules and guidance with regard to this application.

<input type="text" value="Signed"/>	<input type="text" value="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.



0800 138 9109



contractvariations@hodge.co.uk



Customers: hodgebank.co.uk

Advisers: hodgebank.co.uk/intermediaries

Hodge is a trading name of Julian Hodge Bank Limited which is registered in England and Wales (No. 743437). It is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Its registered office is One Central Square, Cardiff, CF10 1FS. Hodge's Privacy Notice confirms how we manage and process your personal data. If you require more detail on how we handle your information please go to hodgebank.co.uk/privacy or call 0800 289 358.

