

Mortgage Account Reference

Personal Information

	Applicant 1	Applicant 2
Title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="text"/> Other	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="text"/> Other
Surname	<input type="text"/>	<input type="text"/>
Full forename(s)	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y	<input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y
Current address	<input type="text"/>	<input type="text"/>
Telephone/mobile	<input type="text"/>	<input type="text"/>
Email address	<input type="text"/>	<input type="text"/>

About your Property

Once you have submitted this application and any valuation fee, if applicable, we will instruct a surveyor to visit the property to value it.

Property address

Estimated property value

You can send your valuation fee by cheque or bank transfer quoting your customer account number. If sending by bank transfer, please pay into the account below:

Account Name: Hera Valuation Fees

Sort Code: 30 16 27

Account Number: 10022232

Reference: Mortgage reference & your surname

Your Solicitor

You must appoint a solicitor to act for you in the sale of the property back to your full ownership.

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

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.

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.

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.

Declaration

I understand, confirm and agree the following:

- 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.
- Where applicable, I enclose payment in order for a Chartered Surveyor to value the property. I understand this fee is non-refundable even if the buy back does not go ahead.
- I understand that the valuation undertaken is a limited inspection for Hodge's purpose 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.
- I have a right to withdraw from this buy back 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.

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 this application, 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 the person who has arranged and advised on this buy back is authorised and qualified to do so.

I confirm that all documents provided are genuine copies of original documents that have been seen by me.

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

Signed

Print name

DDMMYY
Date



029 20787610



HLProperty@hodge.co.uk



Customers: hodgebank.co.uk

Advisers: hodgebank.co.uk/intermediaries