HODGE

You can proceed on an execution-only basis where you are not taking out any additional borrowing. If you are taking out any additional borrowing, you will need to use your own adviser. If you wish to proceed on an execution-only basis, please complete the details on this form and return it to us.

Account Details

Plan/Account Number (must be completed)

Personal Details

Applicant 1

Full name (including title) | D D M M Y Y

Contact number

Applicant 2

Full name (including title) | D D M M Y Y

Contact number

Property Details

Address of the property you wish to purchase

Property address

Postcode

Purchase price £

Will anyone else occupy the property? Y N

If YES, please provide details

Do you intend to complete on the purchase of your new property and the sale of your existing property on the same day? Y N

If NO, please contact us at **contractvariations@hodge.co.uk**

About the Property You Wish to Purchase

The property you wish to purchase must be suitable for the 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.

Commercial property, park homes and non traditional concrete/steel framed dwellings are not acceptable.
If you are unsure about the eligibility of the property, please contact us for assistance.

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 ______

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

Other factors

Is the property the applicant's main residence?	Y	N		
Is the property located in England, Wales or mainland Scotland?	Y	N		
Was the property previously owned by the public sector? (i.e. Council, Housing Association or MoD)	Y	N		
Is the property situated over, or in close proximity to, retail or business premises?	Y	N		
Is the property part of a sheltered housing development?	Y	N		
Do any age restrictions apply to the property?	Y	N		
Is the property used for any form of business/commercial activity?	Y	N		
Is the property listed?	Y	Grade of listing		N
Does the property have more than 10 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	

Repayment Strategy (50+ Mortgage Only – please complete the following)

Loan term

Years

Property details

- [ ] Cashing in existing investments
- [ ] Downsizing
- [ ] Cashing in an endowment policy
- [ ] Sale of other property

If more than one strategy has been selected, please provide details of the value attaching to each strategy in the additional info section.

Solicitor Details

You can choose Joint representation to use our solicitors to act on your behalf, or you can choose Separate representation and choose to instruct your own solicitor. If you instruct your own solicitor, Hodge will instruct our own solicitor to act on our behalf.

For all products you will incur the cost of both our and your solicitor.

If you have chosen separate representation please complete your solicitors details below and they will undertake the conveyancing for you and liaise with our solicitor to arrange for your plan to be transferred to the new property.

- [ ] Joint representation
- [ ] Separate representation

Company name

Name of solicitor acting for you

Address

Telephone

Email

DX

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 the vendor details.

Company name

Name of estate agent

Address

Telephone

Email

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'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, 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
- 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'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		Applicant 2	
By Phone	☐	By Phone	☐
By Mail	☐	By Mail	☐
By Email	☐	By Email	☐
By SMS	☐	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	Applicant 2
Signed	Signed
Print name	Print name
D D M M Y Y	D D M M Y Y
Date	Date

Execution only declaration

Hodge doesn't provide a mortgage advice service. If you're unsure about going ahead with this process, you should seek professional advice from an independent financial adviser or visit www.unbiased.co.uk.

An independent financial adviser will look in detail at your current needs and circumstances to make sure this is the most suitable option for you.

If you want to proceed on an execution only basis for the change to your mortgage, this means you're making all the decisions about this change yourself, without taking advice.

You have the right to request an illustration for any products you are eligible for.

Things you should be aware of about not taking advice

If we can process your request, it's important that you know the implications of proceeding on this basis:

- You will not receive any advice and/or a personal recommendation from us or an independent financial adviser as to whether the change to your mortgage meets your needs.
- If you wanted to, you will not be able to refer a complaint about the suitability of this change to your mortgage to the Financial Ombudsman Service (FOS).
- You will not be able to claim compensation through the Financial Services Compensation Scheme (FSCS) in relation to this change.
- You will still have the right to claim compensation from the Financial Services Compensation Scheme (FSCS) on other aspects of your mortgage.

Declaration

By signing this form. I/we can confirm that I/we understand the conditions above and accept the declaration that I/we are making an informed election to proceed without advice on an execution only basis.

1st Borrower sign

D D M M Y Y

Date

2nd Borrower sign

D D M M Y Y

Date

0800 138 9109 contractvariations@hodge.co.uk hodgebank.co.uk