

Adviser Declaration

Name of adviser	<input type="text"/>
Company name	<input type="text"/>
FCA reference no	<div> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> </div> <div> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> </div> <div> Your firm If relevant, your principle/network </div>
Office address	<input type="text"/>
Email address	<input type="text"/>
Contact telephone no	<input type="text"/>
Date of advice	<div> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> </div>
Mortgage club and/or network	<input type="text"/>
Broker fee (if applicable)	<div>£</div> <input type="text"/>

Declaration

I confirm that the person who has arranged, advised and/or introduced this mortgage is authorised and qualified to do so. I confirm all documents provided are genuine copies of original documents that have been seen by me.

<input type="text"/>	<input type="text"/>	<div> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> </div>
Signed	Print name	Date

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"/>

Adding/Removing Details

Details required if adding/removing an individual to/from an existing mortgage.
Please note that there is a maximum of two applicants on each plan.

Title	Full name	Date of birth	Add	Remove
<input type="text"/>	<input type="text"/>	<div><div>D</div><div>D</div><div>M</div><div>M</div><div>Y</div><div>Y</div></div>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<div><div>D</div><div>D</div><div>M</div><div>M</div><div>Y</div><div>Y</div></div>	<input type="text"/>	<input type="text"/>

Income Details

	Applicant 1	Applicant 2
Has the remaining applicant's income changed at all?	<div><input type="text"/>Y<input type="text"/>N</div> <div>If Yes</div>	<div><input type="text"/>Y<input type="text"/>N</div> <div>If Yes</div>
Source	<input type="text"/>	<input type="text"/>

New applicant income details

Employment status

☐Employed
(please complete "Employed" section)

☐Self-employed
(please complete "Self-employed" section)

☐Retired

Employed

Type of occupation

Time with current employer

years

Employer name

Planned retirement age

years old

Annual Income

£

Self-employed

Position

☐Director☐Partner

Company name

How long has the company been trading?

years

Planned retirement age

years old

Retired

Pension provider

Balance outstanding

£

Other Income

Source of income 1

Annual income

£

Source of income 2

Annual Income

£

Existing Holiday Let Mortgage Details (if applicable)

Current lender

Balance outstanding

£

Contractual monthly payment

£

If not being redeemed, please provide further details

Will this mortgage be repaid on completion?

YN

Property Details Update

Property Valuation

This section is to update any changes to the mortgaged property since completion.

Current Property Value

£

Have there been any alterations to the property since the plan started?

YN

Please provide details

Property Details Update

If you are adding a new applicant onto your mortgage we may require further documents. We will contact you to confirm what documents are necessary once we have reviewed the application.

Your Solicitor

If you are applying for a Holiday Let mortgage you must appoint your own solicitor to act for you. They will assist you in understanding the nature of the long term commitment you are taking on.

Company name	
Name of solicitor acting for you	
Address	
Telephone	
Email	
DX	

Access Arrangements on Property to be Mortgaged

Who should the valuer contact to gain access to the property?	
Contact telephone number	

Direct Debit Payment

Your Direct Debit payment will be taken on the first of each month unless we are advised otherwise. If you require your payment to be debited from your account on a different day, please let us know below.

What is the applicant's preferred Direct Debit payment date
(this must be between the 1st and 22nd of each month)

Additional Information (Should you require more space, please continue on separate sheets of paper)

[illegible]



Please fill in this form and send it to us on online or to:

Hodge
One Central Square
Cardiff
CF10 1FS

Names(s) of account holder(s)

Bank/building society account number

Branch sort code

Name and full postal address of your bank or building society

To: The Manager Bank/building society

Address

Postcode

Instructions to your bank or building society to pay by direct debit

Service user number

1

8

5

1

3

1

Reference

Instructions to your bank or building society

Please pay Hodge Direct Debits from the account detailed in this Instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with Hodge and, if so, details will be passed electronically to my bank/building society.

Signature(s)

Date



The Direct Debit Guarantee

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct De
- If there are any changes to the amount, date or frequency of your Direct Debit Hodge will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request Hodge to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit, by Hodge or your bank or building society you are entitled to a full and immediate refund of the amount paid from your bank or building society
- If you receive a refund you are not entitled to, you must pay it back when Hodge asks you too
- You can cancel a Direct Debit at any time simply by contacting your bank or building society. Written confirmation may be required. Please also notify us.

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.

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 <input type="checkbox"/>	By Phone <input type="checkbox"/>
By Mail <input type="checkbox"/>	By Mail <input type="checkbox"/>
By Email <input type="checkbox"/>	By Email <input type="checkbox"/>
By SMS <input type="checkbox"/>	By SMS <input type="checkbox"/>

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.

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.

Please tick ☐

Declaration

Credit searches and fraud prevention

- Hodge will search credit reference and fraud prevention agencies to check your identity, credit status and help us to make decisions.
- Hodge will undertake a credit search against each applicant recorded on this form
 - Information on applications will be sent to credit reference agencies and will be recorded by them
 - The credit reference agency will check the details supplied against third party databases, public or otherwise
 - A record of the search will be retained
 - The credit reference agency may use the details provided to assist other companies for verification and identification purposes
 - If we decline this application, we are not obliged to tell you the reasons behind our decision

- If you borrow from us, we will give details of your accounts and how you manage it/them to credit reference agencies. If you borrow and do not repay in full and on time, credit reference agencies will record the outstanding debt. This information may be supplied to other organisations by credit reference agencies and fraud prevention agencies to perform similar checks and to trace your whereabouts and recover debts that you owe. Records remain on file for six years after they are closed, whether settled by you or defaulted
- If false or inaccurate information is provided and fraud is identified, details will be passed to fraud prevention agencies to prevent fraud and money laundering
- Full details of what we do and how we, credit reference and fraud prevention agencies will use your information are published on our website. Alternatively, a copy can be sent to you on request. Please phone us on 0800 731 4076.

Declaration

Customer Declaration

- I confirm that I wish to proceed on the terms set out in the Decision in Principle.
- Where relevant, I enclose payment in order for a chartered surveyor to value my property. This is not a survey.
- I understand that this fee is not refundable, even if the property is not eligible for this mortgage. Payment of this fee does not mean that Hodge is obliged to accept my application.
- I understand that this mortgage will be subject to the Holiday Let Mortgage Terms and Conditions (These will be provided to you with any offer we issue but in the meantime, they can also be downloaded from our website and are available on request).
- I have the right to withdraw from this mortgage application at any time before it is complete and I have received the monies. 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 for the work they have undertaken on my behalf.
- All the details in my Decision in Principle and 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 for the mortgage or reduce the amount I may borrow.

Applicant 1	Applicant 2
<div>Signed</div> <div>Print name</div> <div><div>D</div><div>D</div><div>M</div><div>M</div><div>Y</div><div>Y</div></div> <div>Date</div>	<div>Signed</div> <div>Print name</div> <div><div>D</div><div>D</div><div>M</div><div>M</div><div>Y</div><div>Y</div></div> <div>Date</div>

Applicant 1	Applicant 2
<div>Signed</div> <div>Print name</div> <div><div>D</div><div>D</div><div>M</div><div>M</div><div>Y</div><div>Y</div></div> <div>Date</div>	<div>Signed</div> <div>Print name</div> <div><div>D</div><div>D</div><div>M</div><div>M</div><div>Y</div><div>Y</div></div> <div>Date</div>

Declaration

Advisor Declaration

Company name

Name of
Adviser/
Supervisor

Address

Telephone

Email

FCA firm
reference number

Your firm

If relevant, your principle/network

Date of advice

Mortgage Club and/or
Network (if applicable)

Broker Fee
(if applicable)

Declaration

I confirm that I have provided/supervised* the advice and recommendation with regard to the transfer of equity of this mortgage (*delete as appropriate)

Signed

Print name

Date

Supporting Information (Adviser use only)

Application form

☐

Have both applicants signed and dated the declaration in the Declaration section?

Direct Debit for signed and dated

☐

Latest x2 year's SA302 (self-employed applicant)

☐

Please post this application and all supporting documents to:

Hodge, Application Administration, One Central Square, Cardiff CF10 1FS.



0800 721 4076



contractvariations@hodge.co.uk



Customers: [hodgebank.co.uk](https://www.hodgebank.co.uk)

Advisers: [hodgebank.co.uk/intermediaries](https://www.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](https://www.hodgebank.co.uk/privacy) or call 0800 289 358.



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