

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

Name of adviser	<input type="text"/>																								
Company name	<input type="text"/>																								
FCA reference no	<table><tr><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td><td><input type="text"/></td></tr><tr><td colspan="6">Your firm</td><td colspan="6">If relevant, your principle/network</td></tr></table>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Your firm						If relevant, your principle/network					
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Your firm						If relevant, your principle/network																			
Office address	<input type="text"/>																								
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Mortgage club and/or network	<input type="text"/>																								
Broker fee (if applicable)	<table><tr><td>£</td><td><input type="text"/></td></tr></table>	£	<input type="text"/>																						
£	<input type="text"/>																								

If you feel that your customer needs additional support for specific needs, or your customer has experienced a sudden change in circumstances, we're here to help. To make managing your customers' mortgage straightforward, we'll do our best to tailor our service to suit you. Please provide details in the box below.

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.

Equity Release/Retirement Mortgage/Shared Growth Mortgage only: I can confirm that I hold the relevant Equity Release qualifications to advise on this transfer of equity and have followed the Equity Release Council rules and guidance in regards to this application.

<input type="text" value="Signed"/>	<input type="text" value="Print name"/>	<table><tr><td><input type="text" value="D"/></td><td><input type="text" value="D"/></td><td><input type="text" value="M"/></td><td><input type="text" value="M"/></td><td><input type="text" value="Y"/></td><td><input type="text" value="Y"/></td></tr><tr><td colspan="6">Date</td></tr></table>	<input type="text" value="D"/>	<input type="text" value="D"/>	<input type="text" value="M"/>	<input type="text" value="M"/>	<input type="text" value="Y"/>	<input type="text" value="Y"/>	Date					
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Date														

Personal Information

	Applicant 1	Applicant 2
Title	<div><input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms</div> <div><input type="text"/></div> <div>Other</div>	<div><input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms</div> <div><input type="text"/></div> <div>Other</div>
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="checkbox"/>	<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="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<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="checkbox"/>	<input type="checkbox"/>

Income Details

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

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?

☐ Y ☐ N

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

You must appoint your own solicitor to act for you in the Transfer of Equity of your mortgage. They will undertake the conveyancing for you and liaise with our solicitor to arrange for your plan to be updated.

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 Lifetime's approved service providers in relation to this application;
- Other members of Hodge Lifetime'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	Applicant 2
<div>Signed</div>	<div>Signed</div>
<div>Print name</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><div>D</div><div>D</div><div>M</div><div>M</div><div>Y</div><div>Y</div></div> <div>Date</div>

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Please post this application and all supporting documents to:
Hodge, Application Administration, One Central Square, Cardiff CF10 1FS.



0800 721 4076



contractvariationss@hodge.co.uk



Customers: hodgebank.co.uk

Advisers: hodgebank.co.uk/intermediaries

