

## 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](http://hodgebank.co.uk/intermediaries/registration)

Name of adviser	<input type="text"/>
Company name	<input type="text"/>
FCA reference no	<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 <span style="margin-left: 200px;">If relevant, your principle/network</span>
Office address	<input type="text"/>
Email address	<input type="text"/>
Contact telephone no	<input type="text"/>
Date of advice	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Mortgage club and/or network	<input type="text"/>
Broker fee (if applicable)	£ <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.

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## 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"/>	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
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="checkbox"/>	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Income Details

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

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## 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.

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## 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	<input type="text"/>
Name of solicitor acting for you	<input type="text"/>
Address	<input type="text"/>
Telephone	<input type="text"/>
Email	<input type="text"/>
DX	<input type="text"/>

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

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## Use of Your Personal Data Declaration V2.0

I/we understand 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.

We'll only hold your information for as long as our retention policy states. Hodge is the data controller and your information may be stored on paper or an electronic format.

For more information regarding how we may use the information we hold about you, and for your rights as a data subject, please read our Privacy Policy on <https://hodgebank.co.uk/privacy/>

We might also use your information to contact you about products and services we feel may be of interest to you.

We'd like to be able to contact you about these by phone, mail, email or SMS.

If you're happy for us to do that, please tick the relevant boxes below.

#### 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.

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## Credit Searches and Fraud Prevention Statement V2.0

I/we understand the following:

### 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 don't have 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 or 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. If you'd like us to send you a copy, please call us on 0800 731 4076.

## Declaration

### Customer Declaration

- I/we have read and understood V2.0 of the Use of Your Personal Data Declaration, Credit Searches and Fraud Prevention Statement
- I/we understand that any fees are 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/we understand that this mortgage will be subject to 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/we 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/our application are, to the best of my/our knowledge and belief, true and complete. If Hodge finds any to be untrue, it could affect my/our eligibility for the mortgage or reduce the amount I/we may borrow.
- If you've included details about additional support needs (such as accessibility, assistance or financial support) in your application, your mortgage broker will share this information with Hodge solely to assist in the management of your mortgage. This sharing is based on your explicit consent, which you've provided by signing our application form. You can contact us at any time to remove your consent.

#### Applicant 1

D	D	M	M	Y	Y
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Date

#### Applicant 2

D	D	M	M	Y	Y
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Date