

This form is for adviser use only.

Account Details

Plan/Account Number (must be completed)

Personal Details

Applicant 1

Full name (including title)

Contact number

Applicant 2

Full name (including title)

Contact number

Property Details

Address of the property you wish to purchase

Property address

Postcode

Purchase price £

Will anyone else occupy the property?

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?

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	<input type="checkbox"/> Freehold	<input type="checkbox"/> Leasehold	<input type="checkbox"/> Commonhold	<input type="checkbox"/> Absolute
If leasehold, remaining term	<input type="text"/> years			
Annual service charge	<input type="text"/> £			
How is the title held?	<input type="checkbox"/> In one name	<input type="checkbox"/> As beneficial joint tenants	<input type="checkbox"/> As tenants in common	

Property type

Select property type	<input type="checkbox"/> House	<input type="checkbox"/> Bungalow	<input type="checkbox"/> Flat/Maisonette	
If house or bungalow	<input type="checkbox"/> Detached	<input type="checkbox"/> Semi-detached	<input type="checkbox"/> Terraced/Linked	
If flat/maisonette	On what floor is it? <input type="text"/>	Number of floors in block	<input type="text"/>	
Is there a lift?	<input type="text"/> Y	<input type="text"/> N		

Property information

Number of bedrooms	<input type="text"/>
Age of property	<input type="text"/> years
Date purchased	<input type="text"/>

Construction

External walls	<input type="checkbox"/> Brick	<input type="checkbox"/> Stone	<input type="checkbox"/> Timber frame	
Roof	<input type="checkbox"/> Tile	<input type="checkbox"/> Slate	<input type="checkbox"/> Other	
If timber frame, is the outer wall brick, block or stone?	<input type="text"/> Y	<input type="text"/> N		
If flat roof, approx. % of total roof area	<input type="text"/> %			

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

If you have a 50+, Retirement Interest Only, or Hodge Resi mortgage 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

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.

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

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 business to us 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	<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"/>

If you are Directly Authorised please state which Club you would like to use as your payment route:

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 I have provided/supervised* the advice and recommendation with regard to the transfer of this mortgage to another property (*delete as appropriate).

DDMMYY

Date