

Adviser Declaration

Name of adviser

Company name

FCA reference no

Your firm If relevant, your principle/network

Office address

Email address

Contact telephone no

Date of advice

Mortgage club and/or network

Broker fee (if applicable)

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.

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

Income Details

	Applicant 1	Applicant 2
Has the remaining applicant's income changed at all?	<input type="text"/> Y <input type="text"/> N If Yes	<input type="text"/> Y <input type="text"/> N If Yes
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	<input type="text"/>
Time with current employer	<input type="text"/> years
Employer name	<input type="text"/>
Planned retirement age	<input type="text"/> years old
Annual Income	£ <input type="text"/>

Self-employed

Position	<input type="checkbox"/> Director <input type="checkbox"/> Partner
Company name	<input type="text"/>
How long has the company been trading?	<input type="text"/> years
Planned retirement age	<input type="text"/> 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

Will this mortgage be repaid on completion?

Contractual monthly payment

If not being redeemed, please provide further details

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?

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	<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"/>

Access Arrangements on Property to be Mortgaged

Who should the valuer contact to gain access to the property?	<input type="text"/>
Contact telephone number	<input type="text"/>

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)

<input type="text" value="D"/>	<input type="text" value="D"/>
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Please fill in this form and send it to us on online or to:

Hodge One Central Square Cardiff CF10 1FS
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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 Debit
- 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.

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

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)

