

You can proceed on an execution-only basis where you are not taking out any additional borrowing. If you are taking out any additional borrowing, you will need to use your own adviser. If you wish to proceed on an execution-only basis, please complete the details on this form and return it to us.

## Account Details

Plan/Account Number  
(must be completed)

## Personal Details

### Applicant 1

Full name  
(including title)

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| D | D | M | M | Y | Y |
|---|---|---|---|---|---|

Contact number

### Applicant 2

Full name  
(including title)

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| D | D | M | M | Y | Y |
|---|---|---|---|---|---|

Contact number

## Property Details

### Address of the property you wish to purchase

Property address

Postcode

Purchase price

|   |                      |
|---|----------------------|
| £ | <input type="text"/> |
|---|----------------------|

Will anyone else  
occupy the property?

|   |
|---|
| Y |
|---|

|   |
|---|
| N |
|---|

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?

|   |
|---|
| Y |
|---|

|   |
|---|
| N |
|---|

If NO, please contact us at  
**[contractvariations@hodge.co.uk](mailto: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"/> %         |                                |                                       |

## New builds

Is this a newly built property?

☐☐

If yes, is the property fully completed and habitable?

☐☐

If yes, does it have an NHBC or similar warranty?

☐☐

If it is a flat, is the whole block fully completed?  
(including all other flats and communal areas)

☐☐

## Other factors

Is the property the applicant's main residence?

☐☐

Is the property located in England, Wales or mainland Scotland?

☐☐

Was the property previously owned by the public sector?  
(i.e. Council, Housing Association or MoD)

☐☐

Is the property situated over, or in close proximity to, retail or business premises?

☐☐

Is the property part of a sheltered housing development?

☐☐

Do any age restrictions apply to the property?

☐☐

Is the property used for any form of business/commercial activity?

☐☐

Is the property listed?

☐

Grade of listing

☐

Does the property have more than 10 acres of land?

☐☐

Are there any agricultural ties or restrictions on the property?

☐☐

Has the property ever been flooded or is it at significant risk of flooding?

☐☐

Has the property ever been subject to underpinning or major structural repair?

☐☐

Is the property held in trust?

☐☐

Has the property had solar panels fitted?

☐☐

If yes, are they owned outright or subject to a lease?

Owned outright

☐

Subject to a lease

☐

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## 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.

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## Solicitor Details

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

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## 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

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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.

## Execution only – Moving home without financial advice

If you chose to move home on an execution-only (non-advised) basis, we'll process your request without giving you financial advice or recommending whether this is the right option for you. This means you're responsible for deciding whether the mortgage meets your needs and circumstances.

If you're unsure whether it's the right choice for you, you should speak to an independent financial adviser. You can find one at [www.unbiased.co.uk](http://www.unbiased.co.uk). An independent financial adviser can assess your personal and financial circumstances and help you decide whether the mortgage is right for you.

### What execution only means for you

If you're moving home and want to transfer your existing Hodge mortgage to your new property (known as 'porting your mortgage'), you can choose to do this on an execution-only basis. By choosing an execution only service, **you're confirming that you're making your own decision without receiving advice or a recommendation from Hodge.**

You can request an **illustration (ESIS)** so you can review the features, costs and risks porting your mortgage before you commit to the change.

### Important information you must read

If we can process your request, please be aware of the following:

- **We won't provide financial advice or assess whether this change is suitable for your needs.**
- **Because you're making your own decision, you won't be able to complain** to the Financial Ombudsman Service (FOS) about whether the change was suitable for you.
- The **Financial Services Compensation Scheme (FSCS)** doesn't cover losses relating to the suitability of mortgage advice. However, eligible deposits and certain claims remain protected if Hodge were to fail financially.
- You can request an illustration (ESIS) for the porting of your mortgage, and you will receive one before the mortgage offer is issued.

## Execution only declaration

By signing this declaration I/we confirm that:

- I/we have **chosen to port the mortgage** and proceed on an execution only basis.
- I/we understand that Hodge has not made a **recommendation or assessed whether this change is suitable for my/our needs.**
- I/we understand that I/we **can't later make a complaint about the suitability** of porting the mortgage.
- I/we have been informed that I/we can request an **illustration (ESIS)** before the mortgage offer is issued. We'll provide one before the mortgage offer is issued.
- I/we accept responsibility for deciding whether porting the mortgage meets my/our needs.
- I/we understand the FSCS protection position as outlined above.

1st borrower sign

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| D | D | M | M | Y | Y |
|---|---|---|---|---|---|

Date

2nd borrower sign

|   |   |   |   |   |   |
|---|---|---|---|---|---|
| D | D | M | M | Y | Y |
|---|---|---|---|---|---|

Date

