Change of Application Form

Completed Change of Application Forms to be uploaded to the Online Application Case Tracker

SELECT THE TYPE OF AMENDMENT BELOW

1. Mortgage Product ☐
2. Mortgage Details ☐
3. Repayment Term ☐
4. Solicitor Details ☐
5. Interest Only Repayment Strategy ☐
6. Property & Valuation ☐
7. Other/Additional Information ☐

Please complete Intermediary & Case Details and relevant sections only

INTERMEDIARY & CASE DETAILS - Always to be completed

To be completed by Intermediary

Reference number of original application MO:

Customer name

Company/Broker firm

Advisor name

1. MORTGAGE PRODUCT - Only complete if these details are changing

Please specify the full product details below. If the loan has to be split between different product types you need to provide a breakdown of the amounts, as well as complete and submit multiple Direct Debit Mandates. Please use the Additional Information section to provide details when there are more than two products.

Full product description, including rate, e.g. variable, fixed, discounted, tracker	Interest rate %

2. MORTGAGE DETAILS - Only complete if these details are changing

Mortgage amount required £

Amount of deposit/equity (if applicable) £

Capital and Interest £

Interest Only £

Purchase price of property **(purchases only)** £

Source of deposit*

*We require documentary evidence of the source of the deposit to be submitted with the application.

Fees to be added to loan

3. REPAYMENT TERM - Only complete if these details are changing

Term requested (YY/MM)

4. SOLICITOR DETAILS - Only complete if these details are changing

Solicitor firm name

Contact name

Telephone number

Fax number

Email address

Full address

Postcode

5. INTEREST ONLY REPAYMENT STRATEGY - Only complete if these details are changing

Required for all residential interest only mortgages. We also require details for buy to let mortgages if the sale of the property is not the repayment strategy. Please complete this form with the details of the repayment strategy(s) you have in place to repay the capital outstanding at the end of the mortgage term. We will also need evidence to support your stated strategy(s). A combination of repayment strategies will be considered.

Downsizing ☐

Please provide details of the property to be downsized to

Purchase price £ Type of property

Location

Cash savings & investments ☐

Please provide a copy of your last statement plus evidence of regular and on-going contributions which have been in place for at least 12 months.

Endowment policies ☐

Please provide a copy of your last statement showing projected maturity value plus evidence of at least the last 12 months regular contributions.

Pension commencement lump sum ☐

Please provide a copy of your last statement showing projected maturity and the retirement date.

Sale of share portfolio ☐

Please provide a copy of the share certificate or share account statement, a statement showing the current value and a print of the current share price from a recognised source. Only shares held in FTSE 100 listed Companies can be accepted.

The sale of another property owned by you ☐

Please provide details of the property to be sold.

The value of the property £ Amount outstanding on the loan £ Amount of equity in the property £

Full address

Postcode

Is the property in your name only Yes ☐ No ☐

If there is a mortgage on this property with another lender, please provide a copy of your last mortgage statement. If the property is unencumbered, we require the results from a Land Registry search within the last 90 days showing ownership.

Other repayment strategies ☐

Depending on your response, we may need to contact you for further information.

Additional information

6. PROPERTY AND VALUATION DETAILS - Only complete if these details are changing

Full registered address of property to be mortgaged

Postcode

Do you require a Mortgage Valuation Yes ☐ No ☐

Who should the valuer contact to gain access to the property?

Name ☐ Telephone (daytime) ☐ Mobile ☐

Is the property located in Scotland? Yes ☐ No ☐

Scottish properties only - please provide the valuer details

Name of valuer ☐ Date on inspection* ☐

* This must be within the last 3 months

Is this a new build property? Yes ☐ No ☐

Approx. year the property was built (YYYY) ☐

Is the property being occupied for the first time? Yes ☐ No ☐

Is there a NHBC/builders guarantee? Yes ☐ No ☐

Is the property freehold ☐ leasehold ☐ heritable/feudal ☐

If leasehold, state the number of years remaining on lease ☐

Property type

Bungalow – Detached ☐	Bungalow – Semi Detached ☐	Bungalow – Terraced ☐
Flat – Converted ☐	Flat – Purpose built ☐	House – Detached ☐
House – Semi Detached ☐	House – Terraced ☐	Maisonette – Converted ☐
Maisonette – Purpose built ☐	Multi-unit freehold blocks (MUFBs) ☐	Other ☐

Will any part of the property being mortgaged be used for commercial purposes e.g shop/offices etc? Yes ☐ No ☐

How many stories does the property have? ☐

Is property above a commercial premise? Yes ☐ No ☐ If yes, type of commercial premise ☐

Construction

Walls

brick ☐	stone ☐	concrete ☐	timber-framed ☐
timber ☐	pre-fabricated ☐	other ☐	

Accommodation

Number of

Reception rooms ☐	Bedrooms ☐	Internal W.C's ☐	Basement rooms ☐
Kitchens ☐	Bathrooms ☐	Attic rooms ☐	Outbuildings ☐

Garages

single ☐	double ☐	detached ☐	integral ☐
space ☐	none ☐		

Please indicate if you have a family or financial connection with the property owner and provide details in Additional Information (Section 7) ☐

Fee Details

If any fees are to be paid by card please call 0800 678 3066 with card details.

Valuation fee (if applicable) £

7. OTHER/ADDITIONAL INFORMATION