



Intermediary Customer Information Request Form

Please complete form and email to brokerdatarequest@cybg.com

*In order for us to process this request and give the best possible service, please note your relationship manager's name in the 'Subject Field' of your email and ensure that all details below are completed accurately. Please also ensure that the customer and intermediary declarations are signed and dated.

A. Intermediary Details

Intermediary Name	<input type="text"/>
Intermediary Company Name	<input type="text"/>
FCA Reference Number	<input type="text"/>
Contact Number	<input type="text"/>
E-mail Address	<input type="text"/>

B. My Customer Details

Customer Name(s)	<input type="text"/>
Sort Code(s)	<input type="text"/>
Account Number(s)	<input type="text"/>
Correspondence Address	<input type="text"/>
<input type="text"/>	
<input type="text"/>	Postcode <input type="text"/>
Property Address (if different)	<input type="text"/>
<input type="text"/>	
<input type="text"/>	Postcode <input type="text"/>

C. Customer Declaration

I/We agree that you may update the intermediary detailed above with the mortgage information detailed in section E of this form (no other information, other than that detailed in section E, will be provided to the Intermediary as part of this request).

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

D. Intermediary Declaration

I confirm that I have been authorised by the customer(s) above to receive the information detailed in section E. The information will only be used in conjunction with the needs of the customer(s).

I accept responsibility for the security of any information provided to me.

Signed	<input type="text"/>	Date	<input type="text"/>
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E. Existing Mortgage Details (for bank use only)

With reference to the above, please see below the requested information.

Date information provided on (and correct on)

Sort Code	Account Number	Balance	Current Interest Rate	Mortgage Maturity Date	Concessionary Rate End Date (if any)	Repayment Type
<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"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>