the mortgage works

# Intermediary Declaration

First name

Surname

Company name

Address

Postcode

Network/Club if applicable

Packager if applicable

Amount of fee or charge the applicant will pay you for arranging this mortgage product switch (Enter nil if no fee is being charged) £

When is fee payable?

On application ☐ On completion ☐ Up front ☐

Terms under which a refund will be made

Panel number (if known)

Telephone number

Fax number

Email Address

Firm FCA/PRA ref. no.

Appointed representatives No ☐ Yes ☐

Name of principal

Principal FCA/PRA firm ref. no.

Address of principal

Postcode

Email address

Telephone number

Fax number

On what basis was this mortgage arranged? Advised sale ☐ Execution Only ☐ Face to face ☐ Phone ☐

Who provided the advice or information?

I hereby confirm and declare that:

1. I have been instructed by the applicant(s) named in this application to switch to another TMW mortgage product ('product switch') and to complete this application for and on behalf of them.
2. The information in this application and the answers given are those provided by the applicant(s) and to the best of my knowledge are true. I am aware and I have made the applicant(s) aware that it is a criminal offence to knowingly supply false information to obtain a mortgage.
3. I understand that you will rely on this information when deciding to issue a mortgage product switch offer and I will make good any loss that you may suffer as a result of any incorrect or misleading information that I have provided you.
4. I undertake to notify you as soon as I become aware that any information in this application ceases to be true, accurate or complete.
5. I have
   a) outlined the nature of the mortgage and the product to the applicant(s) and
   b) explained the nature and amount of the fees payable by the applicant(s) and I have confirmed with the applicant(s) which fees are not refundable even if you do not offer them a mortgage or the mortgage product switch does not proceed for any other reason.
6. I have advised the applicant(s) that you may disclose details about the progress of their application, including whether or not it has been granted, and details of any complaints they make prior to completion, to me if I request it.
7. I undertake to provide you with all the documentary evidence that you require to support the information contained in this application.
8. I confirm that, if the term of the mortgage continues after the applicant(s) actual or anticipated retirement, a full explanation has been given by the applicant(s) as to how the mortgage will be funded in retirement before I submitted this application.
9. I confirm that all documents provided, whether electronically attached or posted, are genuine copies of the original documents that have been seen by me.

Signature of Introducer

Date D D M M Y Y Y Y

Print Name

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T647 (07.2020)