

Request for Illustration: Product Switch

Before you complete this form, please see 'How The Mortgage Works and Nationwide use your information' by visiting themortgageworks.co.uk. As you're a broker completing this form on behalf of the applicant, please make sure they have understood how their information will be used.

Please return this application to: tmwdirect@themortgageworks.co.uk

This section to be completed by the Introducer

First name	<input type="text"/>	Panel number (if known)	<input type="text"/>
Surname	<input type="text"/>	Telephone number	<input type="text"/>
Company name	<input type="text"/>	Email Address	<input type="text"/>
Address	<input type="text"/>	Firm FCA/PRA ref. no.	<input type="text"/>
	<input type="text"/>	Appointed representatives	No <input type="checkbox"/> Yes <input type="checkbox"/>
	<input type="text"/>	Name of principal	<input type="text"/>
	<input type="text"/> Postcode <input type="text"/>	Principal FCA/PRA firm ref. no.	<input type="text"/>
Network/Club if applicable	<input type="text"/>	Address of principal	<input type="text"/>
Packager if applicable	<input type="text"/>	<input type="text"/>	<input type="text"/>
Amount of fee or charge the applicant will pay you for arranging this mortgage product switch (Enter nil if no fee is being charged)	£ <input type="text"/>	<input type="text"/>	<input type="text"/>
When is fee payable?		Email address	<input type="text"/>
		Telephone number	<input type="text"/>

On application On completion Up front

Terms under which a refund will be made

On what basis was this mortgage arranged? Advised sale

Who provided the advice or information? Face to face Phone

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

Print name

1. Account Details

1. Mortgage Account Number

2. Application Eligibility

2. Have there been any missed payments on the account in the last two months? No Yes
If the answer is yes to this question, it will not be possible to proceed with a product switch at this time.

3. Are there any Further Advance applications currently in progress on the account? No Yes
If the answer is yes to this question, it will not be possible to proceed with a product switch until the Further Advance application has been completed.

4. Is there an early repayment charge on the mortgage elements that are to be switched? No Yes
Payment of the early repayment charge must be received prior to the product switch offer being made.

5. Is property
Owner Occupied? (Residential Only) No Yes
Rented out? (BTL Only) No Yes

If BTL, is there an Assured Tenancy Agreement (England) Occupation Contract (Wales) Short Assured Tenancy or Private Residential Tenancy (Scotland) in place? (BTL Only) No Yes

3. Applicant's Personal Details

	First Applicant	Second Applicant
6. Title	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> Other (specify) <input type="text"/>	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> Other (specify) <input type="text"/>

7. Forenames	<input type="text"/>	<input type="text"/>
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8. Surname	<input type="text"/>	<input type="text"/>
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9. Age and date of birth	Age <input type="text"/> DOB <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"/>	Age <input type="text"/> DOB <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"/>
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	Third Applicant	Fourth Applicant
10. Title	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> Other (specify) <input type="text"/>	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Other <input type="checkbox"/> Other (specify) <input type="text"/>

11. Forenames	<input type="text"/>	<input type="text"/>
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12. Surname	<input type="text"/>	<input type="text"/>
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13. Age and date of birth	Age <input type="text"/> DOB <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"/>	Age <input type="text"/> DOB <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"/>
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4. Additional Account Details (for Limited Company Accounts only)

14. Company trading name

15. Business Address

 Postcode

5. Important information for existing annual rest mortgage customers

Please read carefully as the following information may be applicable to your mortgage:

As part of our commitment to continually improve, and in order to proceed with your application, we will need to make some changes to the way interest is calculated if your mortgage interest is calculated annually.

The key difference between your current terms and the new terms is the way in which interest is calculated. Interest on your mortgage is currently charged monthly to the account based on the balance outstanding on 31st March. When payments are received (or fees applied), the balance for calculating interest reduces (or increases) by the amount of the payment (or fee). On 31st March each year, the interest is then added to the balance outstanding with interest then charged on this new balance for the following year.

With effect from the transfer, we will move the date when interest is added to the last day of each calendar month. Interest from the 1st of the month will be charged daily on the balance as at the last day of the previous month. This will happen every day up to and including the last day of the month, when the interest will be added to the mortgage balance. The balance will continue to be reduced (or increased) by the payments made (or fees charged). Your payment date will not change.

The Standard Residential/ Buy to Let (as applicable) Mortgage Conditions will subject to the above changes continue to govern your mortgage from the date that we transfer the part or parts of the mortgage that are switching onto a new product. Should you have any concerns about the impact of these changes we suggest you obtain independent legal advice. To proceed with the product switch, all borrowers must consent to these changes.

6. New Product Details

16. Mortgage element switch account number

17. Name(s) in which account held

18. Product Product code Interest rate % Product description

19. Arrangement fee Amount/Percentage Add to loan Pay up front Not applicable

20. Acceptance fee Pay up front Not applicable

21. Mortgage element switch account number

22. Name(s) in which account held

23. Product Product code Interest rate % Product description

24. Arrangement fee Amount/Percentage Add to loan Pay up front Not applicable

25. Acceptance fee Pay up front Not applicable

26. Mortgage element switch account number

27. Name(s) in which account held

28. Product Product code Interest rate % Product description

29. Arrangement fee Amount/Percentage Add to loan Pay up front Not applicable

30. Acceptance fee Pay up front Not applicable

31. Mortgage element switch account number

32. Name(s) in which account held

33. Product Product code Interest rate % Product description

34. Arrangement fee Amount/Percentage Add to loan Pay up front Not applicable

35. Acceptance fee Pay up front Not applicable

36. Mortgage element switch account number

37. Name(s) in which account held

38. Product Product code Interest rate % Product description

39. Arrangement fee Amount/Percentage Add to loan Pay up front Not applicable

40. Acceptance fee Pay up front Not applicable

7. Declaration

You (each of you if more than one is applying) agree and declare as follows:

1. We will rely on the information you have given us on this form, which you confirm is complete and true. If you fail to disclose, or give false material information, this may result in any offer being withdrawn. You understand it is a criminal offence to knowingly supply false information to obtain a loan.
2. We can decline an application at any stage without providing a reason for our decision.
3. You must have adequate buildings insurance in place which covers the cost of rebuilding the property.
4. We may disclose details about the progress of your application, including whether or not it has been granted, and details of any complaints you make prior to completion to your broker, Independent Financial Adviser, professional adviser or other intermediary, if the request came from them.
5. You are not bankrupt or insolvent.
6. It is your responsibility to ensure that you have suitable life cover or other means of repayment in place to repay the mortgage in the event of your death.
7. For interest only mortgages, you have an adequate repayment plan in place to repay the mortgage at the end of the term.
8. If fees are payable in connection with your loan application and you have elected to add these to the loan amount you understand that interest will be charged on the full balance of the loan.
9. Fixed and tracker rates are limited offers and may be withdrawn at any time.
10. By signing this application, I agree to the declaration.

All applicants must sign here.

Signature

Date

Signature

Date

Signature

Date

Signature

Date

**Mortgages are secured on your property.
You could lose your property if you do not keep up payments on your mortgage.**

Nationwide Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority under registration number 106078.

You can confirm our registration on the FCA's website (www.fca.org.uk)

The Mortgage Works (UK) plc is a wholly owned subsidiary of Nationwide Building Society and is authorised and regulated by the Financial Conduct Authority under registration number 189623.

Most buy-to-let mortgages are not regulated by the Financial Conduct Authority.

You can confirm our registration on the FCA's website (www.fca.org.uk)

Telephone: **0345 606 4060**

The Mortgage Works (UK) plc, Northampton Administration Centre, Kings Park Road, Moulton Park, Northampton, NN3 6NW.