

Product transfer initial enquiry form



Mortgage details

Mortgage account number:

Mortgaged property address:

.....

Customer / Limited company director details

The mortgage intermediary detailed below has been authorised to act in connection with this product transfer on my/our mortgage account.

Limited company name (if applicable):

.....

Customer / Director 1

Print Name:

Date:

Email:

Customer / Director 2

Print Name:

Date:

Email:

Customer / Director 3

Print Name:

Date:

Email:

Customer / Director 4

Print Name:

Date:

Email:

Intermediary details

I have been appointed by the customer in respect of a product transfer, and my details are as follows:

Intermediary name:

Firm name:

FCA number:

Network/Club:

Firm address:

Telephone number:

Email address:

New product details

Product range:

Standard
Buy-to-LetLarge
HMO/MUFBSmall
HMO/MUFBShort
Term Let

LTV band: _____ %

Product fee:

Will the fee be
added to the loan?

Yes | No

Product type:

2-year fixed

5-year fixed

2-year tracker

Fees to be charged to the customer

Are you charging a fee? Yes No

If 'Yes', how much is the fee?

£

When is the fee to be paid?

Offer

Completion

Is any of the fee
refundable?

Yes | No

If 'Yes', how much is refundable?

£

Intermediary declaration

By submitting this form to CHL Mortgages as an intermediary on behalf of the borrower(s) I confirm that:

- I understand that that the CHL Mortgages Introducer Registration Terms and the CHL Mortgages Introducer Application Terms provided at <https://intermediaries.chli.co.uk/> (together the 'Intermediary Terms') shall be applicable on a continuing basis, to all buy-to-let mortgage applications submitted to Chetwood Financial Limited (trading as CHL Mortgages), as if Chetwood Financial Limited were named therein instead of CHL Mortgages for Intermediaries Limited;
- The regulatory authorisations required to fulfil my duties are current and there are no regulatory concerns, investigations or other actions including the suspension, cessation, termination or removal of any regulatory licence or approval;
- I have up-to-date professional indemnity insurance which conforms to the minimum requirements of the Financial Conduct Authority;
- I have been authorised by all borrowers to complete and submit this application or make the declarations herein on their behalf;
- The borrower(s) has/have confirmed that the information contained within this form is true to the best of their knowledge and contains no material omissions which might have an impact on your decision to offer a product transfer;
- All information contained within this form is true to the best of my knowledge; and
- I have disclosed to all borrowers all fees that I will receive from CHL Mortgages in respect of this application and obtained the borrowers' informed consent to such payments prior to submitting this application.

Please select whether the product transfer application is **Advised** **Non-advised**

I confirm that, I have made the applicant(s) aware that email is not a secure medium and the content may be intercepted before it reaches the intended recipient.

Please tick this box to confirm

Please email this form to: producttransfers@chlmortgages.co.uk

03-01-03-19 - Product Transfer initial enquiry form (6)

CHL Mortgages is a trading name of Capital Home Loans Limited, used under licence by CHL Mortgages for Intermediaries Limited and sub-licensed to Chetwood Financial Limited (company number 09964966). Chetwood Financial Limited is a company registered in England and Wales. Registered office: Ellice Way, Wrexham, LL13 7YT. Chetwood Financial Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority under registration number 740551. Buy to let mortgages for business purposes are not regulated by the Financial Conduct Authority and you will not have any of the protections that the Financial Conduct Authority offers in respect of regulated mortgage contracts or consumer buy to let mortgages. If you wish, you may check the Financial Services Register on the Financial Conduct Authority's website <http://www.fca.org.uk/firms/systems-reporting/register> or by contacting the Financial Conduct Authority on 0800 111 6768. We're also registered with the Information Commissioner's Office under registration ZA218401 and we're a member of CIFAS, the UK's leading fraud prevention service.