

# Product Transfer Request Form



Send completed forms to us at  
[product.transfer@themortgagelender.com](mailto:product.transfer@themortgagelender.com)

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## Completing this form

To use this form you must be an intermediary already registered with us, and you must have the authority of all account holders.

Send completed forms to [product.transfer@themortgagelender.com](mailto:product.transfer@themortgagelender.com).

If you haven't yet registered as an intermediary with TML, or you need support to complete the form, see our website for more information. Alternatively, contact your local BDM, or our Sales Hub at 0344 257 0418.

## What happens when I submit the form?

When you send us the completed form we'll check that the information matches our records, and then generate a Product Transfer Illustration for the selected product. We'll send this to you so it's important that you provide your primary email address.

If you recommend that your client proceeds with the transfer, you should sign and return the Product Transfer Application form, which we'll include with the illustration. Once we get that back, we'll carry out some eligibility checks and if your client is eligible, we will issue a formal offer letter. We'll also confirm the date when the new rate will come into effect.

If your client doesn't want to proceed, then no action is required, their mortgage account will continue on the existing product terms.

## If your client changes their mind

Once an offer has been provided, it will be valid for 30 days. During this window, your client can cancel the application process by either contacting us or simply letting the offer expire. Once the offer has been accepted, the Product Transfer is scheduled to change on the agreed switch date and your client will be subject to early repayment charges, as detailed in the offer, if they want to redeem the mortgage.

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### Eligibility Criteria

To avoid disappointment, please ensure your client meets the eligibility criteria for the product transfer to go ahead. You can also visit the product transfer page on our website for more details on criteria.

- Customer has made the last 12 payments
- Customer has no arrears in the last 12 months
- The customer has more than 2 years remaining on their mortgage

### Customer Details

Mortgage account number	
Customer name (Applicant 1)	
Customer name (Applicant 2, if applicable)	
Customer name (Applicant 3, if applicable)	
Customer name (Applicant 4, if applicable)	
Property address (including postcode)	
Date of Birth (Applicant 1)	
Date of Birth (Applicant 2, if applicable)	
Date of Birth (Applicant 3, if applicable)	
Date of Birth (Applicant 4, if applicable)	
Email address (Applicant 1)	
Email address (Applicant 2, if applicable)	
Email address (Applicant 3, if applicable)	
Email address (Applicant 4, if applicable)	

### Product Selected (Please see our Product Transfer product guide on our website)

Term (e.g. 2 year fixed)	
Rate (e.g. 6.72%)	
Version (e.g. V6.23.1)	

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#### Intermediary Fees

Are you planning to charge a fee?	Yes	No	
Fee amount (if applicable)	£		
When is the fee payable? (if applicable)	On application	On offer	On completion

#### Intermediary Details

##### You are a registered Intermediary with TML

[If not, go to our [Register page](#) on the website, you must register before we can accept business from you]

Intermediary name	
Intermediary company name	
Intermediary FCA number	
Email Address	
Telephone number	
Network/Club	

I confirm I am authorised to act on the above customer/s behalf  
and accept the declaration below.

Date:

\_\_\_\_\_  
Intermediary Signature

#### Declaration

By accepting the following Declaration, you confirm that you have read and agree to TML's Intermediary and Portal Terms & Conditions, which also apply to this Declaration, and also confirm as follows:

- Each applicant has given you authorisation to submit this request and for us to provide the information required to produce a product transfer Illustration, or where you are a specialist distributor (packager), has given authorisation to their intermediary who has authorised you to request an illustration on their behalf.
- Each applicant will be provided with, and given time to consider, a European Standardised Information Sheet (ESIS) or, in the case of a Buy to Let mortgage, an Illustration for the product transfer before an application is submitted to us.
- You confirm that, each applicant has been provided with advice regarding the suitability of the product transfer.
- Each applicant will be provided with a copy of the ESIS or Illustration for the product transfer and an adequate explanation of it, and reasonable steps will be taken to ensure that they meet the eligibility requirements for a product transfer.
- You have explained to each applicant that our assessment of affordability will not take their current income and expenditure into account and that they are responsible for notifying you if they are or become aware of any circumstances that may affect their ability to afford the repayments.
- All information contained in this application is, to the best of your knowledge and belief, true, accurate, up to date and complete in all respects.
- A copy of our Privacy and Fair Processing Notice has been provided to the applicants and they are aware that, if you are sending this form via email, that email is not always a secure medium and the content may be intercepted before it reaches the intended recipient. You accept that the terms of that Privacy and Fair Processing Notice also apply to information provided by you in relation to you and to your firm and staff and you will ensure that your firm and staff are made aware of the Privacy and Fair Processing Notice.
- You are a controller of personal data provided by applicants and you are not a processor of personal data on our behalf, nor a joint controller with us. You shall comply with all applicable laws relating to personal data or privacy.

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