

Product Transfer Request Form



Send completed forms to us at
product.transfer@themortgagelender.com

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.

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 3 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 Firm Reference number	
Email Address	
Telephone number	
Network/Club	

I confirm I am authorised to act on behalf of the above customer/s.

Date:

Intermediary Signature

Declaration

By submitting this form to us, you are confirming that you are accepting the following declaration and that you have read and agreed to TML's Intermediary Website Terms & Conditions, which also apply to this submission:

- 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 on their behalf.
- Each applicant will be provided with, and given time to consider, a European Standard Information Sheet or, in the case of a Buy to Let, 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.
- Where you are acting on behalf of a Directly Authorised Broker or Appointed Representative, you have the authority to accept this declaration on their behalf and you have full authority to act as their agent and to bind them in all respects when dealing with us.
- You, or the Directly Authorised Broker or Appointed Representative whom you are acting on behalf of, are authorised and regulated by the Financial Conduct Authority and hold the relevant permissions required to enter into this agreement.

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Declaration

- Where you are acting on behalf of a Directly Authorised Broker or Appointed Representative, you acknowledge that they remain responsible for compliance with Applicable Laws and all compliance and regulatory responsibilities and obligations towards each applicant and will take responsibility for any errors or omissions made by you.
- All information contained in this application and provided is, to the best of your knowledge and belief, true, accurate, up to date and complete in all respects.
- You will inform us immediately if you, or the Directly Authorised Broker or Appointed Representative whom you are acting on behalf of, cease to be authorised by the Financial Conduct Authority, cease to be an Appointed Representative or no longer hold the relevant permissions required to enter into this agreement.
- You have provided a copy of the Privacy and Fair Processing Notice 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 Notice also apply to information provided by you in relation to you and to your firm.