

A guide to product transfers

Arranging a product transfer for your client **in 6 easy steps**



STEP 1

CUSTOMER CONTACT

We will have notified your client if a product transfer is an option and advised them to reach out to a professional intermediary. To carry out a product transfer you already be registered with us before we can accept applications from you. If not already registered with us, go to <https://intermediary.themortgagelender.com/MolRegistration/>

STEP 2

DOWNLOAD FORM

If your client is interested in a product transfer, visit the dedicated page on our website and [download a request form](#).

STEP 3

FILL IN THE FORM

Fill in the request form. You'll need to:

- Provide information on all parties to the existing mortgage (you need to work with them to complete this)
- Review and confirm eligibility of all parties to the existing mortgage
- Choose a product
- Provide details of any fees you are charging
- Give us your details and select your submission route
- Sign the intermediary declaration
- Send the completed form back to us at product.transfer@themortgagelender.com

STEP 4

TML REVIEW

When we get the completed form, we'll carry out customer and broker verification checks. If everything is ok we'll send a pre-offer Illustration and Product Transfer Application to you. If there is a problem with the checks we will contact you to discuss.

If your client wants to go ahead, return the Product Transfer Application to us at product.transfer@themortgagelender.com

STEP 5

RETURN OFFER

Once we get the Product Transfer Application back, we'll assess your client's eligibility. If everything checks out, we'll then issue an offer letter and Illustration including any special conditions - please note, this offer will be valid for 30 days. If your client is happy with the offer, they need to sign and return the offer acceptance form to us. If there is a problem with your client's eligibility we will contact you to discuss.

STEP 6

THE FINAL STAGES

That's it - the product transfer is now complete! We'll contact your client to thank them for staying with TML.