

Intermediary Mid-Term Amendment Request, With or Without Rate Switch

The Society's rate switch products can be viewed at: www.mbs-intermediaries.com/mortgage-products

Please email all requests to: brokers@monbs.com

Borrower(s) signature(s) are required for a mid-term amendment.

This change to the loan account can only be requested by registered brokers. Intermediary registration forms can be found at www.mbs-intermediaries.com. If you have any queries regarding registration please contact the Broker Sales team on 01633 844380 or email brokers@monbs.com.

PLEASE COMPLETE SECTIONS 1 TO 3 TO SUPPORT REQUEST

SECTION 1 – OVERVIEW	
INTERMEDIARY FIRM (NAME AND ADDRESS)	POSTCODE:
ADVISER NAME	
FCA REGISTRATION NUMBER	
APPLICANT 1 - CUSTOMER(S) FULL MIDDLE & LAST NAME(S)	
APPLICANT 2 - CUSTOMER(S) FULL MIDDLE & LAST NAME(S)	
MORTGAGE ACCOUNT NUMBER: <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"/>	
SECURITY ADDRESS	POSTCODE:
APPLICANTS MAIN CONTACT NUMBER	
CURRENT PRODUCT EXPIRY DATE <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	
ESTIMATED PROPERTY VALUATION	
LTV	
IF RATE SWITCH REQUIRED WHAT IS THE NEW PRODUCT DESCRIPTION AND CODE	
PRODUCT FEE £	ADD TO LOAN: YES <input type="checkbox"/> NO <input type="checkbox"/>
REPAYMENT STRATEGY DETAILS IF CURRENTLY INTEREST ONLY	
BROKER FEES BEING CHARGED £	

For Customer:

I/We can confirm that I/we have authorised the above broker to undertake the rate switch and/or a mid-term amendment on my/our behalf and confirm that advice and recommendation has been provided in respect of the request.

Privacy Notice:

Monmouthshire Building Society's Customer Privacy Notice and details of how we use your information should be read prior to signing. This is available from your broker or online at www.monbs.com/privacy.

BORROWER 1 SIGNATURE	BORROWER NAME
	DATE <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
BORROWER 2 SIGNATURE	BORROWER NAME
	DATE <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

SECTION 2 – MID-TERM AMENDMENT

PLEASE COMPLETE THE RELEVANT SECTION ACCORDING TO WHICH TYPE OF AMENDMENT REQUIRED (PLEASE TICK BOX OF RELEVANT MID-TERM AMENDMENT).

TERM EXTENSION - WHERE THE NEW TERM **DOES NOT** EXTEND INTO BORROWERS RETIREMENT AGE

PLEASE STATE THE TERM OF MORTGAGE REQUIRED (WHEN IS THE MORTGAGE TO BE REPAYED IN FULL).

PLEASE STATE THE REASON FOR TERM EXTENSION REQUEST.

WHAT AGE WILL THE BORROWER(S) BE AT THE END OF THE NEW TERM?

APPLICANT 1:

APPLICANT 2:

WHAT IS/ARE THEIR INTENDED RETIREMENT AGE(S)?

APPLICANT 1:

APPLICANT 2:

WHAT IS THE NATURE OF THEIR EMPLOYMENT?

APPLICANT 1:

APPLICANT 2:

PLEASE TICK TO CONFIRM THAT YOU HAVE CARRIED OUT AN INCOME AND EXPENDITURE ASSESSMENT WITH YOUR CUSTOMER(S), THE MORTGAGE IS AFFORDABLE AND THIS REQUEST FORMS PART OF YOUR ADVICE AND RECOMMENDATION.

IF ANY ELEMENT OF THE MORTGAGE IS ON AN **INTEREST ONLY BASIS** PLEASE CONFIRM THE REPAYMENT STRATEGY.
PLEASE NOTE THE STRATEGY SHOULD BE ACCEPTABLE UNDER THE SOCIETY'S LENDING CRITERIA WHICH CAN BE FOUND ON OUR WEBSITE
WWW.MBS-INTERMEDIARIES.COM/LENDING-CRITERIA

TERM EXTENSION – WHERE THE NEW TERM EXTENDS INTO BORROWERS RETIREMENT AGE (IF WITHIN 10 YEARS TO RETIREMENT)

PLEASE STATE THE TERM OF MORTGAGE REQUIRED (WHEN IS THE MORTGAGE TO BE REPAYED IN FULL).

PLEASE STATE THE REASON FOR TERM EXTENSION REQUEST.

WHAT AGE WILL THE BORROWER(S) BE AT THE END OF THE NEW TERM?

APPLICANT 1:

APPLICANT 2:

WHAT IS/ARE THEIR INTENDED RETIREMENT AGE(S)?

APPLICANT 1:

APPLICANT 2:

WHAT IS THE NATURE OF THEIR EMPLOYMENT?

APPLICANT 1:

APPLICANT 2:

PLEASE TICK TO CONFIRM THAT YOU HAVE CARRIED OUT AN INCOME AND EXPENDITURE ASSESSMENT WITH YOUR CUSTOMER(S), THE MORTGAGE IS AFFORDABLE AND THIS REQUEST FORMS PART OF YOUR ADVICE AND RECOMMENDATION.

PLEASE TICK TO CONFIRM THAT YOU HAVE PROVIDED A PENSION STATEMENT OR PAYSIP TO CONFIRM CONTRIBUTIONS.

IF ANY ELEMENT OF THE MORTGAGE IS ON AN **INTEREST ONLY BASIS** PLEASE CONFIRM THE REPAYMENT STRATEGY.
PLEASE NOTE THE STRATEGY SHOULD BE ACCEPTABLE UNDER THE SOCIETY'S LENDING CRITERIA WHICH CAN BE FOUND ON OUR WEBSITE
WWW.MBS-INTERMEDIARIES.COM/LENDING-CRITERIA

TERM REDUCTION

PLEASE STATE THE TERM OF MORTGAGE REQUIRED (WHEN IS THE MORTGAGE TO BE REPAYED IN FULL).

PLEASE STATE THE REASON FOR TERM REDUCTION REQUEST.

PLEASE TICK TO CONFIRM THAT YOU HAVE CARRIED OUT AN INCOME AND EXPENDITURE ASSESSMENT WITH YOUR CUSTOMER(S), THE MORTGAGE IS AFFORDABLE AND THIS REQUEST FORMS PART OF YOUR ADVICE AND RECOMMENDATION.

IF ANY ELEMENT OF THE MORTGAGE IS ON AN **INTEREST ONLY BASIS** PLEASE TICK TO CONFIRM THAT THE TERM REDUCTION WILL NOT HAVE AN IMPACT ON ACCESS TO FUNDS TO REPAY AT END OF NEW TERM.

PLEASE STATE CURRENT/ANY CHANGES TO THE REPAYMENT STRATEGY.
PLEASE NOTE THE STRATEGY SHOULD BE ACCEPTABLE UNDER THE SOCIETY'S LENDING CRITERIA WHICH CAN BE FOUND ON OUR WEBSITE WWW.MBS-INTERMEDIARIES.COM/LENDING-CRITERIA

SWITCH TO INTEREST ONLY

PLEASE STATE THE REASON FOR REQUEST TO SWITCH TO AN INTEREST ONLY LOAN.

PLEASE STATE THE AMOUNT ON INTEREST ONLY. PLEASE ADVISE OF ANY SPLIT IF PART INTEREST ONLY AND CAPITAL REPAYMENT.

INTEREST ONLY AMOUNT: £

CAPITAL REPAYMENT AMOUNT (IF PART INTEREST ONLY AND CAPITAL REPAYMENT): £

PLEASE CONFIRM THAT THE LENDING MEETS THE SOCIETY'S CURRENT INTEREST ONLY CRITERIA:
PLEASE SEE LENDING CRITERIA INFORMATION AT WWW.MBS-INTERMEDIARIES.COM/LENDING-CRITERIA.

PLEASE TICK TO CONFIRM THAT LENDING MEETS THE SOCIETY'S INTEREST ONLY CRITERIA.

PLEASE STATE THE REPAYMENT STRATEGY.
PLEASE NOTE THIS SHOULD BE ACCEPTABLE UNDER THE SOCIETY'S LENDING CRITERIA WHICH CAN BE FOUND ON OUR WEBSITE WWW.MBS-INTERMEDIARIES.COM/LENDING-CRITERIA

PLEASE TICK TO CONFIRM THAT YOU HAVE PROVIDED THE EVIDENCE OF THE REPAYMENT STRATEGY.

PLEASE TICK TO CONFIRM THAT YOU HAVE CARRIED OUT AN INCOME AND EXPENDITURE ASSESSMENT WITH YOUR CUSTOMERS AND THAT THE MORTGAGE IS AFFORDABLE AND THIS REQUEST FORMS PART OF YOUR ADVICE AND RECOMMENDATION.

SWITCH TO REPAYMENT/PART REPAYMENT

PLEASE STATE THE REASON FOR REQUEST TO SWITCH TO REPAYMENT.

PLEASE STATE THE AMOUNT ON INTEREST ONLY. PLEASE ADVISE OF ANY SPLIT IF PART INTEREST ONLY AND CAPITAL REPAYMENT.

CAPITAL REPAYMENT AMOUNT: £

INTEREST ONLY AMOUNT (IF PART INTEREST ONLY AND CAPITAL REPAYMENT): £

IF ANY ELEMENT REMAINS ON AN INTEREST ONLY BASIS PLEASE STATE THE REPAYMENT STRATEGY BELOW:

PLEASE TICK TO CONFIRM THAT YOU HAVE CARRIED OUT AN INCOME AND EXPENDITURE ASSESSMENT WITH YOUR CUSTOMERS, THE MORTGAGE IS AFFORDABLE AND THIS REQUEST FORMS PART OF YOUR ADVICE AND RECOMMENDATION.

SECTION 3 – ADDITIONAL INFORMATION

IF YOU HAVE ANY ADDITIONAL INFORMATION TO SUPPORT AND HELP THE SOCIETY WITH THE ASSESSMENT OF THIS REQUEST PLEASE INCLUDE THIS IN THE BOX BELOW:

Please note that we reserve the right to ask for additional information and/or documentation in order to consider the request.

If a further advance/transfer of equity is required please complete the relevant section of our residential application form, see www.mbs-intermediaries.com/documents

Telephone calls may be monitored and/or recorded for security and training purposes.

To find out how we use your data, please visit www.monbs.com/privacy, pop into a branch, call our Customer Services Department (01633 844340) or email dataprotection@monbs.com.

Monmouthshire Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Financial Services Register Number: 206052.

Head Office: Monmouthshire House, John Frost Square, Newport, South Wales, NP20 1PX