

Intermediary Customer Account Information Request Form

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

Please email all requests to: brokers@monbs.com

Information can only be requested by registered brokers. Intermediary Registration forms can be found on our website at www.mbs-intermediaries.com. If you have any queries regarding registration please contact the Business Development Team on 01633 844380 or email brokers@monbs.com.

INTERMEDIARY FIRM (NAME AND ADDRESS)		POSTCODE:
ADVISER NAME		
FCA REGISTRATION NUMBER		
REASON FOR REQUEST (e.g. Further Advance, Rate Switch, Transfer of Equity, Other)		
CUSTOMER(S) FULL NAME(S) (INCLUDING MIDDLE NAMES)		
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:

INFORMATION REQUIRED (PLEASE TICK BOX AS REQUIRED)	MONBS USE ONLY	IC CODE
OUTSTANDING BALANCE <input type="checkbox"/>		
REPAYMENT TYPE <input type="checkbox"/>		
CURRENT INTEREST RATE <input type="checkbox"/>		
WHEN THE CURRENT PRODUCT ENDS <input type="checkbox"/>		
LTV <input type="checkbox"/>		

Broker

Please read and confirm (please tick box) the statement below:

I can confirm that I have authorisation from the customer(s) to obtain data on their behalf and confirm that advice and recommendation has been given in respect of the rate switch request.

If your firm did **not** originally introduce the above mortgage account to the Society, please ask your customer(s) to complete the authorisation below:

Customer

I/We can confirm that I/we have authorised the above broker to obtain information about my/our mortgage account so that they may provide advice and recommendation regarding our account:

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"/>

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

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