

Intermediary Rate Switch Request Form

The Society's rate switch products can be viewed at: www.mbs-intermediaries.com/mortgage-products
If a further advance/transfer of equity/mid-term amendment is also required please see website for relevant form.

Please email completed form to: brokers@monbs.com

Rate Switch requests 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.

Intermediary firm (Name and address)	Postcode:
Adviser name	
FCA registration number	
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"/> - <input type="text"/>	
Loan part	
Security address	Postcode:
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"/>	
Estimated property valuation	
New product description and code	
Repayment strategy details if currently interest only	
Product fee: Add to loan <input type="checkbox"/> Pay upfront <input type="checkbox"/>	
Broker fee being charged £	

Broker

If your firm **originally introduced** the above mortgage account to the Society we do not require the customer(s) to sign an authorisation.

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:

I/We can confirm that I/we are still residing at the mortgaged property.
(Residential mortgages only)

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"/>

MONMOUTHSHIRE BUILDING SOCIETY USE ONLY			
Broker IC code		Re-valuation required	Yes <input type="checkbox"/> No <input type="checkbox"/>
Account verification	Yes <input type="checkbox"/> No <input type="checkbox"/>	Product/LTV	Yes <input type="checkbox"/> No <input type="checkbox"/>



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

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

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

We take your privacy very seriously and always treat your personal information with the greatest care, holding it safely and securely. For further information, our Privacy Notice is available from our website www.monbs.com/privacy, in branch or agency offices or call our Customer Services Department (01633 844340). This will give you more detailed information.