

# Product Transfer Application Form

Please use this form to to submit an application for a product transfer on behalf of your client.

Product transfer applications can only be requested by registered brokers. Intermediary registration forms can be found at [www.cumberland.co.uk/intermediaries/register](http://www.cumberland.co.uk/intermediaries/register).

The Society's product transfer rates can be viewed at [www.cumberland.co.uk](http://www.cumberland.co.uk) or requested via your BDM for Residential.

If you require further information or guidance on this application or if applicant wishes to discuss a further advance or transfer of equity, please contact us on 01228 403 312 or email [commercialfollowons@cumberland.co.uk](mailto:commercialfollowons@cumberland.co.uk)

Please email completed form to [commercialfollowons@cumberland.co.uk](mailto:commercialfollowons@cumberland.co.uk)

Intermediary Firm

Intermediary Email

Adviser Name

FCA Reference Number

Contact Number

Date Submitted

## Applicant Details

Title

Mr

Mrs

Miss

Ms

Other

Name

Date of birth

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
D	D	M	M	M	Y	Y	Y

Address

Telephone Number

Email Address

Postcode

Title

Mr

Mrs

Miss

Ms

Other

Name

Date of birth

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
D	D	M	M	M	Y	Y	Y

Address

Telephone Number

Email Address

Postcode

Title	Mr		Mrs		Miss		Ms		Other	
-------	----	--	-----	--	------	--	----	--	-------	--

Name

Date of birth

D	D	M	M	M	Y	Y	Y	Y	

Address

Postcode

--	--	--	--	--	--	--	--	--	--

Telephone Number

Email Address

## Account Details

Mortgage Account Number		Mortgage Account Name	
Security Address		Current Product Expiry Date	
Postcode		Estimated Property Value	

## New Product Details

Holiday Let		Residential (owner occupied)		BTL	
-------------	--	------------------------------	--	-----	--

Product Name

Initial Rate

Product Fee (if applicable)

When should the new product be made effective?

As soon as possible		End of current product term		Set date (must be 1st of month)	
---------------------	--	-----------------------------	--	------------------------------------	--

Remain on the same term?

Yes		No	
-----	--	----	--

If no, what term is being requested?

Please note that there is a fee payable for a change of term, Please see our tariff of mortgage charges for more details.

Repayment Strategy

Repayment Strategy if interest only

Are there any further advance applications currently in progress?

## New Product Details (continued)

The following questions only need answered for Holiday Let and Buy to Let applications.

Is the property still in use as a Holiday Let/Buy to Let?

Yes

No

Do you own 4 or more mortgaged Holiday Let or Buy to Let properties?

Yes

No

Do you own more than 6 investment properties in your portfolio?

Yes

No

Is the required licence/planning permission in place? (Scotland only)

Yes

No

Is the property still self-funding?

Yes

No

At the Cumberland we support our customers that may be finding it difficult to manage their finances or need extra help. There may be ways we can help to make it easier.

Yes

No

Do you have any health or personal circumstances we should be aware of that may impact your ability to access and/or manage your products and our services?

Note: Extra support can include health conditions such as a disability, a mental health condition, Hearing/Sight Loss. Significant life events such as a bereavement, relationship breakdown and caring responsibilities. Or other circumstances such as learning difficulties or low digital skills.

If yes, please outline your circumstances and the extra support you require.

Let us tell you how we'll use that information, so you know.

We'll note information about your situation and extra support on your account(s). This will be available to Cumberland Group colleagues to help meet your needs when interacting with you or dealing with your account(s), without you having to explain your situation each time.

We need your permission for us to do this. You can withdraw that at any time by contacting us. Please tick the box if you're happy for us to use and record your information in this way.

## Intermediary Declaration

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

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 product transfer.

I confirm to the best of my knowledge, the information above is true and accurate.

I am not aware of any changes in the client(s) circumstances which would inhibit their ability to make the mortgage payment.

I have provided advice and recommendation to the client.

I/We agree that Cumberland Building Society will process my personal data in accordance with their Privacy Notice, which I have been made aware of and can be viewed online at [Cumberland.co.uk/privacy](https://cumberland.co.uk/privacy).

Intermediary Signature	Date
------------------------	------

Intermediary Name

Broker Fee (if applicable)

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 Declaration

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	Date
----------------------	------

Borrower 1 Name

Borrower 2 Signature	Date
----------------------	------

Borrower 2 Name

Borrower 3 Signature	Date
----------------------	------

Borrower 3 Name

### CUMBERLAND USE ONLY

Fee to collect

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

Re-valuation required

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
-----	--------------------------	----	--------------------------

Account verification

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
-----	--------------------------	----	--------------------------