REQUEST FOR OFFSET SAVINGS ACCOUNT FOR LINKING TO AN OFFSET MORTGAGE

Accord mortgages

This is the supplementary form referred to on page 5 of the Accord Mortgages application form.
It must be completed for every application for an Accord Mortgages offset account.

Please complete this form in BLOCK LETTERS and tick the appropriate boxes.
All the names on the offset savings account must also be a party to the mortgage application.

We need you to complete this form so that we can take into account any savings you intend to place in an offset savings account when we calculate your monthly payment. When any mortgage offer is issued we will send you an offset savings account form to enable the offset savings account(s) to be opened.

For further details of the offset account and the offset savings account please refer to your financial adviser, or your product factsheet.

OFFSET SAVINGS ACCOUNT

	1st Applicant	2nd Applicant
1. Title (Mr, Mrs, etc.) and Surname		
2. Forename(s)		
3. Present Address	Postcode	Postcode

If you want to link your offset mortgage to more than one offset savings account, just complete the additional offset savings account details below.

OFFSET SAVINGS ACCOUNT

4. Title (Mr, Mrs, etc.) and Surname		
5. Forename(s)		
6. Present Address	Postcode	Postcode

OFFSET SAVINGS ACCOUNT

7. Title (Mr, Mrs, etc.) and Surname		
8. Forename(s)		
9. Present Address	Postcode	Postcode

Unless you tell us otherwise, any cashback or refund related to your mortgage product will be paid into the first offset savings account detailed above.

Your Monthly Mortgage Payment
With offset you have two options for your payment amount. You can opt to pay on a gross basis and your payment will be based on your mortgage balance only. This allows any offset savings balances to work harder by reducing the outstanding mortgage balance faster. Alternatively, you can decide to pay on a net basis and your payment will be based on the combined balance of your mortgage and your savings balance(s). You must estimate the amount that you will pay into your savings accounts within 30 days of completion of the mortgage. Your net payment will initially be based on this estimate.

Please indicate the payment option you require Gross Payment ☐ Net Payment ☐

Based on estimated initial savings of £