

Account number

Please use this application form for existing Accord clients wishing to apply for an additional loan.

Step 1. Obtain an Illustration for you and your client [here](#)

Step 2. Complete the below editable PDF application form

Step 3. Ensure you have received confirmation from all applicants to submit the application and their personal data for processing

Step 4. Save the completed application form as a PDF – check out our guide on how to do this [here](#)

Step 5. Attach the completed application form along with supporting documentation (please see section below) in an email to ApplicationSubmissions@ybs.co.uk. Please note: we cannot accept a scanned copy of the application form

Step 6. Contact us to make your valuation fee payment by card over the phone.

CHECKLIST: TO AVOID DELAYS, PLEASE ENSURE ALL THE FOLLOWING SUPPORTING DOCUMENTS ARE ENCLOSED:

Latest payslip/pension payslip & latest bank statement (employed/retired applicants)	☐	Evidence of repayment strategies for any new Interest-Only borrowing (e.g. latest investment statements)	☐
Evidence of post-retirement income (if within 15 years of retirement)	☐	Evidence of permission from Homes England/Help to Buy (Wales) Ltd for the additional lending	☐
Latest personal bank statement & latest business bank statement (self-employed applicants)	☐	For more details of our requirements please refer to our website www.accordmortgages.com	

APPLICATION DETAILS

PERSONAL DETAILS	1st Applicant				2nd Applicant			
1. Title and surname								
2. Forenames								
3. Contact telephone no								
4. Mobile/email address								
5. Is the Mortgaged property still your main residence?	Yes	☐	No	☐	Yes	☐	No	☐
If No, please provide details								
6. Stay at current address	Years		Months		Years		Months	
7. If stay is less than 3 years please provide previous address	House no				House no			
	Address				Address			
	Postcode				Postcode			
	House no				House no			
	Address				Address			
	Postcode				Postcode			
	House no				House no			
	Address				Address			
8. Period stay at this address	Years		Months		Years		Months	
9. Residential status								
10. Number of dependants (e.g financially dependent on you)								
11. Please give details of anyone over the age of 17 who will be living with you in the mortgaged property								
12. Are you a UK citizen or a citizen of an EU/EEA Country?	Yes	☐	No	☐	Yes	☐	No	☐
If No, do you have indefinite leave to remain?	Yes	☐	No	☐	Yes	☐	No	☐

INCOME DETAILS

1. Are you currently	Employed	☐	Self-employed	☐	Employed	☐	Self-employed	☐
	Retired	☐	Un-employed	☐	Retired	☐	Un-employed	☐
	Other				Other			
2. Status	Permanent employee	☐	Fixed-term contract	☐	Permanent employee	☐	Fixed-term contract	☐
	Zero-hours contract	☐	Salaried director	☐	Zero-hours contract	☐	Salaried director	☐
	Non-salaried director	☐			Non-salaried director	☐		
3. Are you	Full-time	☐	Part-time	☐	Full-time	☐	Part-time	☐
4. If you are on a fixed-term or zero-hour contract	Current DD MM YYYY	Start			Current DD MM YYYY	Start		
		End				End		
	Previous DD MM YYYY	Start			Previous DD MM YYYY	Start		
		End				End		
5. Employer and/or pension/annuity company name								
6. Employer and/or pension/annuity company address								
				Postcode				Postcode
7. Name and telephone number of the individual who can provide confirmation of your income	Name				Name			
	Telephone no				Telephone no			
8. Start date of your current employment								
9. Total annual salary and/or pension/annuity	Salary £				Salary £			
	Pension £				Pension £			
	Zero-hour salary (if applicable) £				Zero-hour salary (if applicable) £			
10. What is your expected retirement age?								
11. Other Income (e.g. working tax credits/ Dividends)	Source				Source			
	£				£			
If you receive any of the following benefits, please provide details: Universal credit, DLA, PIP, Employment and Support Allowance, Carers allowance, Industrial Injuries Disablement Benefit	Source				Source			
	£				£			
If dividends, please confirm the following	Lastest year				Lastest year			
	Year 2				Year 2			
	Projection				Projection			
12. Is your income likely to reduce in the future?	Yes	☐	No	☐	Yes	☐	No	☐
If YES, please provide details								

13. Do you receive childcare vouchers from employer?	Yes	☐	No	☐	Yes	☐	No	☐
14. Please tell us the annual amount	£				£			
15. Please tell us how much you have in savings	£				£			
Self-employed Applicant								
16. Name and address of business								
	Postcode				Postcode			
17. % Shareholding	%				%			
18. Name and address of your accountant (including name of who is dealing)								
	Postcode				Postcode			
19. What qualifications does your accountant hold?								
20. Telephone no (incl STD)								
21. How long have you been self-employed?								
22. Last 2 years share of net profits and projection	Latest year £				Latest year £			
	Year 1 £				Year 1 £			
	Projection £				Projection £			
23. If you are a company director, please provide share of Net profits minus Corporation tax for the last 2 years, plus projection	Latest year £				Latest year £			
	Year 1 £				Year 1 £			
	Projection £				Projection £			

RETIREMENT INCOME

	1st Applicant				2nd Applicant			
1. Please tell us your anticipated retirement income	£				£			
2. Please also tell us what you will do should your retirement income be insufficient to cover the mortgage payments	Sell a second property	☐	Sell this property and downsize	☐				
	Sell this property and move in with relatives	☐	Sell this property and move to rented accommodation	☐				
	Make regular overpayments to repay capital				☐			

Please note that the term of the mortgage cannot extend beyond your expected retirement date for any interest-only parts of your mortgage.

FINANCIAL DETAILS

1. Do you have a current account with a bank or building society?	Yes	☐	No	☐	Yes	☐	No	☐
If YES, state how long you have had it (if you have more than one, refer to longest held account)								
	Years		Months		Years		Months	
Do you have a debit card?	Yes	☐	No	☐	Yes	☐	No	☐
2. Do you have a savings account?	Yes	☐	No	☐	Yes	☐	No	☐
If you have an account with the YBS, what is your account number?								
3. How many credit cards do you have?								

4. Do you have any debts outstanding under hire purchase arrangements, bank loans, credit cards, student loans etc?	Yes	☐	No	☐	Yes	☐	No	☐
If YES, please give details, including outstanding debts, monthly repayments, the dates when the debts are due to be fully repaid, and if they will be paid off on completion.								
	Type				Type			
	Outstanding debt				Outstanding debt			
	Monthly repayment				Monthly repayment			
	Final repayment				Final repayment			
	Repaid on completion				Repaid on completion			
5. Are you planning to take on any future debts?	Yes	☐	No	☐	Yes	☐	No	☐
6. Do you pay childminding, nursery or school fees or any other significant outgoings? If your property is leasehold, please include any ground rent or service charge amounts								
	Type of outgoing				Type of outgoing			
	Monthly amount £				Monthly amount £			
7. Do you regularly use an overdraft facility? Max amount overdrawn in last 3 months	Yes	☐	No	☐	Yes	☐	No	☐
	£				£			
8. Are you making any maintenance payments to a third party?	Yes	☐	No	☐	Yes	☐	No	☐
	If YES, please provide details							
9. Have you ever had a mortgage or been party to one?	Yes	☐	No	☐	Yes	☐	No	☐
10. Following completion of this mortgage, will you be party to any other mortgages(s)?	Yes	☐	No	☐	Yes	☐	No	☐
	If YES, please provide details. If you are in the process of applying for a mortgage (including buy-to-let and investment mortgages) with another lender, you should tell us about this too							
11. When you take out this mortgage what will the outstanding balance be on any other mortgage?	£				£			
12. Have you ever been behind with any financial commitment (e.g. mortgage, secured loan, unsecured, credit card)?	Yes	☐	No	☐	Yes	☐	No	☐
	If YES, please provide details							

13. Have you ever had a county court judgment (CCJ) or High court judgment registered against you (court decree in Scotland), or are you currently involved in any court proceedings in connection with debt?	Yes	☐	No	☐	Yes	☐	No	☐
	If YES, please provide details							
14. Have you ever been subject to an individual voluntary arrangement (IVA), bankruptcy order or trust deed (Scotland only)?	Yes	☐	No	☐	Yes	☐	No	☐
	If YES, please provide details							
15. Is any part of the property being let or used for business purposes?	Yes	☐	No	☐	Yes	☐	No	☐
	If YES, please provide details							
16. Has an improvement grant been made on the mortgage property in the last 5 years or do you intend to apply to the local authority for an improvement grant?	Yes	☐	No	☐	Yes	☐	No	☐
	If YES, please provide details							

LOAN DETAILS

1. Which additional loan product are you applying for? Please note that an offset additional loan can only be taken if the existing mortgage is an offset.	You must complete this box to avoid delays. Please provide product code.							
2. Additional loan required and over what term	£		Years				Months	
3. Is the loan for the benefit of all applicants?	Yes	☐	No	☐				
4. How do you intend to repay the additional loan?	Repayment		£		Interest-only		£	
	Total		£					
5. For the amount of the interest-only box above, please state the proposed repayment strategy e.g existing endowment, general investments, sale of mortgage property	Repayment strategy				Repayment strategy			
	Amount		£		Amount		£	
6. Is there a Help to Buy equity loan outstanding on the property?	Yes	☐	No	☐				
	If YES, which Help to Buy Equity Scheme?							
7. Outstanding Help to Buy equity loan amount/term	£		Years		Months			

8. What is the purpose of the additional loan?	Purchase of land	£	Details	
	Debt Consolidation – Unsecured Debt (max age 70 at the end of the mortgage term. Not permitted for interest-only)	£	Details	
	Debt Consolidation – Secured Debt (max age 70 at the end of the mortgage term. Not permitted for interest-only)	£	Details	
	Purchase of interest	£	Details	
	Capital raising (not for business purposes)	£	Details	
	Home improvements	£	Details	
	Structural home improvements	£	Details	
	Energy-related loan	£	Details	
	Debt consolidation and energy – related loan	£	Details	
	Purchasing Freehold/ Share of Freehold Interest	£	Details	
	Lease Term Extension	£	Details	
	Purchase of Adjoining Land	£	Details	
9. What is the current estimated value of the property?	£			
10. If you are borrowing to make alterations to your property, is planning permission required? (if YES, please provide a copy)	Yes	☐	No	☐
11. Are there solar panels on the property?	Yes	☐	No	☐

IMPORTANT INFORMATION

HIGHER LENDING CHARGE - PLEASE REFER TO YOUR FINANCIAL ADVISER.

12. Do you want to add the higher lending charge to your loan amount?	Yes	☐	No	☐	N/A	☐	
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VALUATION AND PRODUCT FEE

Product fee	☐	Credit/debit card. To safeguard your details, we do not take your card information on this form. Please contact us on 0345 1669 227 with your card, or provide a daytime telephone number where we can call to arrange payment
Valuation fee	☐	Credit/debit card. To safeguard your details, we do not take your card information on this form. Please contact us on 0345 1669 227 with your card, or provide a daytime telephone number where we can call to arrange payment
Insurance arrangements	You must consider how you would pay your mortgage if you became unemployed, sick or had an accident and therefore could not work. Your financial adviser should give you advice on payment protection arrangements. It is a condition of your mortgage that your property must be adequately insured. If you are making structural changes to your property that will increase its value, you should review your insurance cover.	

METHOD OF PAYMENT

If your existing mortgage is paid by one direct debit, the additional loan payments will automatically be collected by the same direct debit. In this case, you do not need to complete a new direct debit instruction form.

If your existing mortgage is paid by two or more direct debits from different bank accounts, Accord Mortgages will automatically collect the additional loan payments from the bank account which pays the main part of your loan. If you want to make alternative arrangements, or if you are unsure which bank account pays the main part of your loan, please contact the Mortgage Helpline on **0345 1200 872** immediately after your additional loan completes.

Accord Mortgages will give you 10 working days notice of any change in the amount or date of your direct debit collections.

ABOUT YOUR PERSONAL INFORMATION (ALL APPLICANTS) AND (IF APPLICABLE) YOUR OFFSET SAVING ACCOUNT

Accord Mortgages Limited decides what personal information we need to collect about you, how we use it, who we share it with and how long we keep it. This makes us the data controller of your personal information for data protection purposes.

When we refer to 'Society', 'YBS Group' or 'Yorkshire Group' we mean Yorkshire Building Society Group (Accord's parent) trading as:

- Yorkshire Building Society (sometimes referred to as The Yorkshire, YBS)
- Chelsea Building Society (sometimes referred to as The Chelsea, CBS)
- Norwich and Peterborough (sometimes referred to as N&P)

We will use the personal information obtained from you and additional information obtained in the course of opening and managing your account. This includes, but is not limited to, name, address, identification, account transactions and communications and where relevant sensitive information, credit reference data, financial crime data, health details, nationality and legal proceedings.

We will respect your rights to privacy and will only collect, use, store and share your personal information where a lawful purpose applies:

- It's necessary for the performance of a contract you have or have requested to enter into
- If we have a legal obligation
- If we have a legitimate business interest where it does not have an unfair impact on you
- If you have given your consent where the collection, use, storage or sharing involves special category (sensitive) personal information (e.g. health race and religion)
- Where we believe you or another person is at risk and we need to protect your or their vital interests
- Where it's in the public interest or we have been given official authority to do so.

For full details of the types of information used in each product, and the other lawful purposes we may use it for, please see our 'How we use your personal information' booklet which can be found at [accordmortgages.com](https://www.accordmortgages.com) or via your intermediary.

HOW WE USE YOUR PERSONAL INFORMATION

When you apply for a mortgage account we will use your personal information together with other information available including relevant sensitive information, (e.g. health, race and religion), for:

- Identity verification (including checking documents with issuing authorities e.g. driving license – DVLA)
- Processing any Approval in Principle
- Processing your application
- Making credit decisions about you
- Contacting you where necessary
- Fraud prevention and detection
- Arranging associated insurance (where you have requested us to do so)
- Completing your mortgage
- Administering your account up to and including redemption
- Legal and regulatory compliance
- Marketing (where we have your consent) and market research
- General business purposes.

If you are making an enquiry or application on behalf of another person they must have: authorised you to act on their behalf, to give us their personal information, to authorise a credit search and to consent to our use of their personal information. We may also share information about you with a joint account holder if they make an enquiry or further application without you being present where they have confirmed you have authorised them to act on your behalf.

We will share information with one or more Credit Reference Agencies (CRAs), now and in the future, to:

- Check your identity
- Verify the accuracy of the information you have provided
- Assess your creditworthiness and affordability
- Manage your account(s)/relationship with us
- Process your application
- Ensure any offers we send are appropriate to you
- Trace and recover debts
- Prevent criminal activity, fraud and money laundering.

We will continue to exchange information about you with CRAs while you have a relationship with us. We will also inform the CRAs about your settled accounts. If you borrow and do not repay in full and on time, CRAs will record the outstanding debt. This information may be supplied to other organisations by CRAs.

When CRAs receive a search from us they will place a search footprint on your credit file that may be seen by other lenders.

We routinely carry out an additional credit search for account management purposes but this will not affect your future creditworthiness as no hard footprint will be left.

If you are making a joint application, or tell us that you have a spouse or financial associate, we will link your records together, so you should make sure you discuss this with them, and share with them this information, before applying. CRAs will also link your records together and these links will remain on your and their files until such time as you or your partner successfully files for a disassociation with the CRAs to break that link.

If we use an automated system to make a decision about you, such as credit scoring, we will tell you if your application is rejected and give you the opportunity to discuss the matter with us. The decision can be reviewed to ensure an appropriate decision has been made.

The personal information we have collected from you will be shared with fraud prevention agencies, who will use it to prevent fraud and money-laundering and to verify your identity. If fraud is detected, you could be refused certain services, finance or employment in the future.

Further details of how your personal information will be used by us, Credit Reference Agencies and Fraud Prevention Agencies can be found in our booklet 'How we use your personal information' which can be found at [accordmortgages.com](https://www.accordmortgages.com) or via your intermediary.

If you take out Yorkshire Building Society home insurance or other insurance we and/or your insurer may:

- Share information you have supplied and details of your policy and claim with each other, a data administration company, licensed credit reference agencies, relevant insurance companies and fraud prevention bodies. This information will be made available to other prospective lenders and insurers.

- Use your personal information together with other information available (including relevant sensitive information (e.g. health, race and religion) to carry out a risk assessment, process your application, administer your policy and claims during the life of the policy, for fraud prevention and detection, legal and regulatory compliance, marketing and market research and general business purposes.
- We may contact your medical professional representative with your explicit consent to obtain information or confirm a pre-existing medical condition you have informed us of, but we will always explain why we need the information, how it will be used and who it will be shared with.

Insurers pass information to the Claims and Underwriting Exchange register, run by Insurance Database Services Ltd. (IDS Ltd.). The aim is to help us check information provided and also to prevent fraudulent claims. When we deal with your request we may search the register. When you tell us about an incident (such as fire, water damage or theft) which may or may not give rise to a claim, we will pass information relating to it to the register. IDS Limited may also pass on information received from other insurers about other incidents involving anyone insured under the policy.

We will only use, keep and share your personal information for as long as is required to meet our legal and regulatory obligations, industry standards and business requirements, and to deal with your enquiry, administer and manage your accounts, products and relationship with us. After this time, we will delete your personal information in line with the requirements of the Financial Conduct Authority, Prudential Regulation Authority, Money Laundering regulations, Financial Ombudsman Service and HM Revenue & Customs.

DISCLOSING YOUR PERSONAL INFORMATION

We may disclose your personal information with other people or organisations as follows:

- The progress of your application, including if it has been granted to your broker, Independent Financial Adviser, professional adviser or other intermediary, if the request came from them.
- With HM Revenue & Customs, Department for Work & Pensions, any lender, landlord, employer or professional adviser named on this form to obtain information to confirm any income received and payments made.
- To any government body providing you with financial assistance (for example, Homes England or Help to Buy (Wales) Limited) any application or account information in which that body has a legitimate interest such as an unauthorised letting or property alteration or any identified false or inaccurate information.
- The information you have supplied, and details of how you conduct your account including disputes, arrears and repossession proceedings, to joint account holders, anyone who guarantees the loan or their legal adviser.
- Your account, including current balance, current monthly payment, projected balance and monthly payment to a subsequent charge holder in connection with any application for the postponement of that charge.
- Your account, including balance outstanding, interest rate(s) applicable, early repayment charges and monthly payments to potential borrowers if one of you in the future enquires about adding or removing a party to the account (also known as a 'transfer of equity'). However, such a transaction will not proceed without a completed application form signed by all account holders.
- With Yorkshire Building Society and its subsidiary companies for fraud prevention, lawful purposes, account administration and for general business purposes (e.g. updating customer records, handling customer queries and complaints).
- Personal information to (i) our external auditors and regulatory bodies including the Financial Ombudsman Service, Prudential Regulation Authority and the Financial Conduct Authority, and (ii) associate companies, agents and service providers including solicitors and valuers acting for the Society, field agents, debt recovery agents, tracing agents, letting agents, brokers, printers, market research agencies and providers of information technology services.

If we sell or transfer all or part of our business, we may share or transfer our customer records as part of the proposed/actual sale or transfer. However, we will only do so under a contract or where we have a legal obligation to do so. The protection, security and confidentiality of your personal information are important to us and we put in place appropriate safeguards to manage this.

Where we transfer personal information to countries outside the European Economic Area (EEA) this is always done under a contract which includes appropriate safeguards for the security and confidentiality of your personal information, with your consent, or where permitted by Data Protection laws.

YOUR RIGHTS UNDER THE DATA PROTECTION LAWS

You have the right to:

- Be informed about processing of your personal information
- Have your personal information corrected if it is inaccurate or incomplete
- Object or restrict to the processing of your personal information
- Have your personal information erased subject to conditions (e.g. where the processing fails to satisfy legal requirements)
- Request access to your personal information and details about how we process it
- Move, copy or transfer your personal information also known as 'data portability'
- Challenge automated decision making including profiling, which is the automated processing of your personal information to evaluate certain things about you.
- Complain to the Information Commissioner's Office (<https://ico.org.uk/>) which enforces data protection laws

TRANSFER OF MORTGAGE

Although you may not transfer your interest in the mortgage without consent, there is no restriction in the mortgage against a transfer of the Society's interest. The Society may transfer its interest in your mortgage to another party which may not necessarily be a building society or an associated body of a building society. If the Society transfers its interest in your mortgage your borrowing membership of the Society may cease. For more information please see our 'How we use your personal information' and 'Your Rights and Data Protection' booklets.

Our 'How we use your personal information' booklet explains what personal information we need to collect, why we need it, where we may obtain information from and how long we keep it for.

Our 'Your rights and Data Protection' booklet provides more information on data protection laws, our legal obligation and your individual rights in relation to the processing of your personal information.

To obtain a copy of these booklets, or if you wish to invoke any of the rights listed above, simply visit our website **accordmortgages.com** or via your intermediary. If you want to see what personal information we hold about you, you can request a copy of this by completing a Subject Access request form. This form can be found on our website **accordmortgages.com** or by putting a request in writing to our head office address.

Our Data Protection Officer (DPO) provides help and guidance to make sure we apply the best standards to protecting your personal information. You can contact the DPO by writing to: Data Protection Officer, Yorkshire House, Yorkshire Drive, Bradford BD5 8LJ or by emailing dpo@ybs.co.uk.

DECLARATION TO BE SIGNED BY ALL APPLICANTS

I apply for an additional loan on the mortgaged property

1. I agree:

- That this information will form part of the mortgage contract between Accord Mortgages and me and that if I enter into an associated insurance contract it will also be the basis of a contract between the insurer and me.
- To tell Accord Mortgages about any information which may affect any insurance cover provided. I understand that the policy may be invalid, or the cover affected, if I do not disclose this information.
- To pay Accord Mortgages' conveyancing costs and valuation fees even if the additional loan does not complete.
- To a 10-day notice period for direct debit changes.
- To Accord Mortgages and its agents or other members of its group disclosing the details of all offset savings accounts to the other applicants and borrowers.
- To the processing of my personal information as explained above. My agreement here applies in any circumstances during the additional loan where Accord Mortgages needs to make a credit decision.
- To tell Accord Mortgages of any changes to the information in this form which arise between now and completion of the additional loan.

2. I confirm that:

- The information in this form is true and complete, including any answers which have been completed by someone else.
- I am aware that repayments for the capital & interest parts of my additional loan may continue after I am retired. I confirm that I have discussed this with my adviser and that I understand the financial implications.

3. I understand that:

- Accord Mortgages does not have to make an offer of an additional loan or refund any fees paid.
- Accord Mortgages may withdraw or modify any offer of an additional loan (particularly any quoted rates of interest and repayment) at any time before the additional loan is actually made.
- If the additional loan is not completed within 6 months of the date of the offer Accord Mortgages may:
- Require further information about my application or the mortgaged property. This may include a new valuation being carried out at my cost.
- Withdraw a product and offer a different product to me if the original one is no longer available. This may result in different payments being required under the mortgage. If this becomes necessary, Accord Mortgages will provide full details of the new payments before completion.

PLEASE CONFIRM THAT THE FOLLOWING STATEMENTS APPLY TO THE APPLICATION:

- There are no more than 2 applicants
- The property to be mortgaged is not a studio flat
- The applicant will not rely on non-sterling Income or assets to repay the mortgage
- The application will not be for the purpose of porting an existing mortgage
- If there is an element of Interest Only and the repayment strategy is sale of mortgaged property, the customer has a minimum equity of £250,000, or £300,000 if the property is located in London.
- The applicant(s) will not be using the property for business purposes or altering the outside appearance of the property for business reasons
- The property to be mortgaged will be the applicant(s) main residence

☐

I confirm that all the above statements apply

☐

I confirm that all applicants have consented to my acting on their behalf

☐

I confirm that I have read 'Use of my Information' to the applicant(s) and they agree to their information in the way specified here

A Decision in Principle will confirm that we would be prepared to lend the applicant(s) the amount requested. It is not a guarantee because it's subject to proof of Income as well as any references we request and a valuation of the property.

CONSENT TO A CREDIT SCORE

Please be aware that a Decision in Principle is a full credit search and will leave a hard footprint against the credit record of the applicant(s). Please confirm you wish to continue

☐

MANAGING OUR CONTACT WITH YOU

From time to time we would like to tell you about products and services that may be of benefit to you. These may be provided by us or other carefully selected organisations. To do this, we would like to communicate with you by post, email, text message, telephone or any other appropriate messaging service. Please tell us how you would like to be kept informed about our latest products and services:

1st Applicant details				2nd Applicant details			
Email (including text & other messaging services)	☐	Phone	☐	Email (including text & other messaging services)	☐	Phone	☐
Mail	☐	No contact, please.	☐	Mail	☐	No contact, please.	☐

We will not sell your details to other companies but we may use marketing agents to act on our behalf.

Please tick to confirm applicant one has been made aware of the above and gives consent to proceed

☐

Please tick to confirm applicant two has been made aware of the above and gives consent to proceed

☐

FOR INTRODUCER USE ONLY**INSURANCE ARRANGEMENTS
& INTERMEDIARY
DECLARATION****DECLARATION**

I have advised the customer on the types of valuations available; the other costs included; and credit scoring (if you need any further information about these please refer to our website **accordmortgages.com**). I confirm that the registration number for the Financial Conduct Authority (FCA) completed below is correct, and that I have complied with the FCA rules in giving advice to the customer(s). I confirm that I am not submitting this application on behalf of an unauthorised person or firm.

Name			
Position			
Firm name and address	Name		
	Address		
		Postcode	
Email			
Telephone			
Fax			
FCA number			
Please indicate the mortgage club/network to be used	We are unable to pay you a procuration fee without this information.		
What is your fee charge to your client for arranging this mortgage?	£	What is the amount of your fee that is refundable if the mortgage application does not proceed?	£
What is your fee charged to your client for arranging insurance?	£		
Is the level of service offered to your client advised?	Yes	☐	No ☐
Has a Key Facts Illustration been issued to your client for this purpose?	Yes	☐	No ☐

EXTRA SPACE

Please remember to quote the relevant section and question number to your answer.

If you require additional space, please attach a separate sheet and tick if applicable ☐

Please note: without adequate security, email is not a secure form of communication as it may be intercepted, lost or corrupted. If you send attachments via email without adequate security this should be made clear to your client as Accord Mortgages cannot accept liability for any loss of personal information provided via this medium.

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