

Broker Authorisation Form

Please note: This form can only be used for one of the request types below.

This form cannot be used for:

- Further advances

Please complete this form in black/blue ink and using block capitals.

Mortgage account or application reference number

SELECT TYPE OF REQUEST

- Mortgage choices Change in repayment method Change of guarantors Transfer of equity
- Term extension Second charge consent Change in legal ownership

SELECT NEW PRODUCT

Mortgage product choice

Product fee (if applicable) Fee to be added to the loan? Yes No

INTERMEDIARY DETAILS

Firm name

Advisor name

Contact number

Email address

Address

Postcode

FCA number

Consent obtained to act on behalf of the customer(s)? Yes No

CUSTOMER 1

Full name(s)

Date of birth / /

Correspondence address

Postcode

Security address (if different)

Postcode

Customer Signature

CUSTOMER 2

Full name(s)

Date of birth / /

Correspondence address

Postcode

Security address (if different)

Postcode

Customer Signature

CUSTOMER 3Full name(s) Date of birth / /

Correspondence address

 Postcode

Security address (if different)

 Postcode
Customer
Signature
CUSTOMER 4Full name(s) Date of birth / /

Correspondence address

 Postcode

Security address (if different)

 Postcode
Customer
Signature
PAYMENT DETAILS**Please note: Failing to complete this section will prevent your request from proceeding.**

If you are an appointed representative of one of our preferred networks (2 Plan, Connells, Home in One, Mortgage Intelligence, Mortgage Next Network, FYB, Lighthouse, Openwork, Positive Solutions, Sesame, Tenet, Primis, John Charcol and Quilter), we will automatically pay the procurement fee via this route. Alternatively, please tick your preferred route from the options below.

- | | | | | |
|------------------------------|--|--|--|--|
| <input type="checkbox"/> 3mc | <input type="checkbox"/> Dynamo for Intermediaries | <input type="checkbox"/> Legal and General | <input type="checkbox"/> Next Intelligence | <input type="checkbox"/> Paradigm |
| <input type="checkbox"/> PMS | <input type="checkbox"/> SimplyBiz | <input type="checkbox"/> TMA | <input type="checkbox"/> MCI club | <input type="checkbox"/> Brilliant Solutions |

BROKER DECLARATION**Please sign in the space below**

- I confirm the regulatory authorisations required to fulfil my duties are current and there are no regulatory concerns, investigations or other actions including the cessation, termination or removal of any regulatory licence or approval.
- I confirm that I have up-to-date professional indemnity insurance which conforms to the minimum requirements of the Financial Conduct Authority.
- I confirm that I have been authorised by all applicants to complete this application on their behalf.
- I confirm all information contained within this form is true to the best of my knowledge.
- I confirm that I have provided the customer with advice on the suitability of the mortgage product selected and explained the importance of reading any subsequent mortgage offer.

Broker name Signature Date / / **WHAT HAPPENS NEXT?**

1. Scan and email the completed form to brokertransfers@krbs.com. Within 5 working days, we will email you the product transfer documentation.
2. Please check and confirm all details are correct then arrange for your customer to sign the offer acceptance form then scan and email the form to brokertransfers@krbs.com
3. Within 5 working days, we will email you to confirm that the request has been processed and when the change will become effective from. Within 30 days of the product switch becoming effective, you will receive any procurement fee due.



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 Registered in England and Wales (company number 7312896). Registered office: Reliance House, Sun Pier, Chatham, Kent, ME4 4ET.
 OneSavings Bank plc is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (registered number 530504).

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