

Platform product switch application form

Please use this form to complete a product switch on behalf of your client; **you should download and complete electronically before printing.** This form can also be used to request a term change at the same time as the product switch. If you require further information or guidance on this application or the broker registration process, visit **platform.co.uk** or call the Mortgage Desk Team on **0345 070 1999*** (Option 1) - Lines open 9am to 5pm, Monday to Friday and 10am to 5pm on Thursday.

Broker checklist

- ✓ Are you registered with Platform? If not please register/re-register by visiting **platform.co.uk**.
Before completing this application, please check:
- ✓ Customer eligibility.
- ✓ Customer affordability.
- ✓ Check you have your client's existing mortgage account number. It can be found on your client's annual statement, initial completion letter or more recent product maturity letter. This could be a 9-digit number beginning with 13 or an 8-digit number beginning with 3.
- ✓ Whether you require further documentation such as a recent payslip and Bank statement to be enclosed with the application.
- ✓ Whether your customer requires a revaluation. Please note that your client's Loan to Value (LTV) and eligible product range is based on the higher of the last valuation we hold for your property, or an estimate based on the House Price Index (HPI) valuation. You can also provide an estimated value in the section below. In which case, you should choose your client's required product using the revised LTV based on your new estimated valuation. There may be a charge for a revaluation.
- ✓ Whether your client's circumstances have changed recently and we have not been informed, e.g. name, residential address, terms of the mortgage. If so, these changes will need to be completed prior to the product switch.

More information is available on the Platform website, or if you would like to discuss this, please call our Mortgage Desk Team.

Mortgage application type

Mainstream Buy to Let or Let to Buy

Customer details

	First applicant	Second applicant
Title	<input type="text"/>	<input type="text"/>
Name	<input type="text"/>	<input type="text"/>
Date of birth	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>	<input type="text"/>
Post code	<input type="text"/>	<input type="text"/>
Telephone number	<input type="text"/>	<input type="text"/>
Email address	<input type="text"/>	<input type="text"/>

Existing Platform mortgage account information

If your client holds more than one Platform mortgage account linked to the same property, you should not continue. Please advise your client to contact us directly on **01752 236 550*** (8.30am to 5.30pm Monday to Friday) where we can assist.

Mortgage account number	<input type="text" value="1"/> / <input type="text" value="3"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Property type	House <input type="checkbox"/>	Bungalow <input type="checkbox"/>	Flat/Maisonette <input type="checkbox"/>
Current Mortgage balance	£ <input type="text"/>	Property style	Detached <input type="checkbox"/>	Semi-detached <input type="checkbox"/>	Mid Terrace <input type="checkbox"/>
Current product end date?	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	End Terrace <input type="checkbox"/>	Flat - Purpose built <input type="checkbox"/>	Flat - Converted <input type="checkbox"/>	
or is your client on SVR?	Yes <input type="checkbox"/> No <input type="checkbox"/>	If flat or maisonette:		- how many floors are there in total?	<input type="text"/>
Current remaining Mortgage term	<input type="text"/> Yrs <input type="text"/> Mths			- on what floor is your client's property situated?	<input type="text"/>
Repayment type	Repayment <input type="checkbox"/>			Number of bedrooms	<input type="text"/>
	Interest only <input type="checkbox"/>			(any room originally intended for use as a bedroom)	
Tenure	Leasehold <input type="checkbox"/>	Freehold <input type="checkbox"/>	What is the current estimated value of the property?		<input type="text"/>
			<ul style="list-style-type: none"> • Please choose your client's product using LTV based on this new estimated value. • If you provide a new estimated valuation and this moves the LTV into a new LTV band, we will request a revaluation. 		

Buy to Let / Let to Buy information

Buy to Let / Let to Buy property address

Address

Rental Income
(Buy to Let Only)

£

Post code

New Platform mortgage product required

Full product description

Product code

Interest rate

%

Please ensure that if your client has a residential mortgage you do not choose a BTL product, or vice versa, otherwise this could delay your product switch request.

Product fee

£

Does your client want to add the product fee to the loan?

Yes

No

Card Payment

Cheque Enclosed

Please be aware that adding the fee to the mortgage will increase the total outstanding balance and will affect the LTV calculation. If it moves to a new LTV band, your client may need a different product. If your client is paying the fee up front, we accept cheque or card payment. If paying by cheque, please include with application form made payable to Platform, if paying by card we will call your client before completion for card details.

Does your client want to change the term of their mortgage?

If yes, please indicate new term

Yrs

Mths

Please note, if your client's mortgage payment is changing e.g. as a result of changing the term, as a responsible lender we will need to assess the affordability of the loan. Please complete the Income and Expenditure Declaration on the Platform website and enclose with the application form.

Please provide us with any additional information that will help us to process the application e.g. Capital Repayments

Broker details

Broker correspondence address

(this will be used to forward any paperwork)

Company/Broker firm

Adviser name

Contact number - office

FCA reference no.

Contact number - mobile

Email address

(This should be the email address that is registered with Platform and is where all status updates will be sent to)

Submission route

Please ensure you correctly select your submission route from the table below, for any queries relating to your submission route please contact our Mortgage Desk Team on **0345 070 1999*** (Option 1) - Lines open 9am to 5pm, Monday to Friday and 10am to 5pm on Thursday.

Please tick your application submission route:

Connells Countrywide PRIMIS (FC) Ingard 2 Plan Wealth Management Ltd

Openwork Personal Touch PRIMIS (AMF) Sesame Tenet

Home in One Financial Services Limited Positive Solutions Mortgage Advice Bureau

Stonebridge Mortgage Solutions Ltd Life and Easy Ltd Quilter (formerly Intrinsic & CAERUS)

Mortgage Intelligence AR Network Mortgage Next Lighthouse Advisory Services Limited

If your submission route is not shown above, please select the mortgage club you have used:

Legal & General Mortgage Intelligence Paradigm PMS Simply Biz TMA

Dynamo for Intermediaries

Declaration

Type of Mortgage: Residential Mortgage BTL Mortgage - Advised BTL Mortgage - Execution only

Broker fee (charged directly to your customer) £

I confirm that I have provided my client with a Mortgage Illustration

If you would like the broker copy of the offer document to be sent via your registered email address instead of posted, please tick this box.

Please note: We use Transport Layer Security (TLS) to encrypt and protect email traffic. If your mail server does not support TLS, you should be aware that any emails you request from us, may not be protected in transit.

I confirm that I am acting on behalf of the applicant(s) in connection with their mortgage requirements and I am authorised to complete this application on their behalf. I have informed the applicant(s) at the time that the information contained in this form will be used and disclosed in the following ways and they consent to this:

1. any details provided by the applicant(s) or relating to this application will be held in the Platform's records;
2. Platform will disclose details about the applicant(s) and this application to the Credit Reference and Fraud Prevention Agencies who may make them available to subscribing lenders. The applicant(s) is/are aware of the importance of providing accurate information and that any false or inaccurate information will be made available to Credit Reference and Fraud Prevention Agencies;
3. Platform may share information about the applicant(s) and the application with HM Revenue & Customs ('HMRC') to check the accuracy of the information which has been provided to us. HMRC may use the information that we provide to them to inform its risk profiling activities and to establish any mismatch with declared income; and
4. Under the rights available to data subjects under the General Data Protection Regulation (GDPR), applicants have the right to obtain a copy of the information held about them.

I am the broker, I have complied with the requirements on my part as detailed above, and agree to your Terms of Business for Intermediaries (which I have been provided with and read) on behalf of the intermediary.

Broker signature (please leave blank until printed)

Signed Dated

Print name

Once you have completed this form...

- Print out the completed form and send to: Platform Mortgage Services, P.O. Box 3462, Cheadle Road, Leek ST13 9BG.
- Please ensure all supporting documentation is included with the application form (including a cheque for the product fee if appropriate).

Once we have received and assessed your application (together with any revaluation, if necessary), we will send both you and your client a copy of the application illustration and offer document. Your client will also receive a Form of Authority, which they are required to sign and return back to us. Your client will need to check and sign the Form of Authority, before sending back to us at least 10 working days prior to the product switch being completed. If your client is paying a product fee via card payment, we will request payment once we have received the signed form back.

Important Information

This information is for the use of professional mortgage advisers only. It is not intended to be used by the general public. Members of the general public seeking further information should contact us at the telephone number listed on our contact page, or seek independent mortgage advice.

Please call 01752 236 550* (8.30am to 5.30pm Monday to Friday) if you would like to receive this information in an alternative format such as large print, audio or Braille.

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*Calls to 01 and 03 numbers are charged approximately up to 9p per minute. Charges for calls made outside of the UK will be determined by your local provider. Calls may be monitored or recorded for security for security and training purposes.

Information correct as at 09/2023.