

## Platform product switch application form

Please use this form to complete a product switch on behalf of your client; you should download and complete 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 [www.platform.co.uk](http://www.platform.co.uk) or call the Broker Support team on 0345 070 1999 (Option 1).

### Broker checklist

- ✓ Are you registered with Platform? If not please register/re-register by visiting [www.platform.co.uk](http://www.platform.co.uk).  
Before completing this application, please check:
  - ✓ Customer eligibility.
  - ✓ Customer affordability.
  - ✓ Whether you require further documentation such as a recent payslip and Bank statement to enclose with the application.
  - ✓ Whether your customer requires a revaluation. Please note that your client's Loan to Value and eligible product range is based on the original property valuation we have on file. There may be a charge for a revaluation.

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

### Mortgage application type

Mainstream  Buy to Let  Let to Buy   
 I have provided my client with a quote KFI

### 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 account, you should not continue. Please advise your client to contact us directly on 01752 236 550 where we can assist.

WMS Mortgage account number	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	Tenure	Leasehold <input type="checkbox"/>
Current Mortgage balance	£ <input type="text"/>		Freehold <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"/>	Property type e.g. Detached	<input type="text"/>
or is your client on SVR?	Yes <input type="checkbox"/> No <input type="checkbox"/>	What is the current estimated valuation of the property?	£ <input type="text"/>
Current remaining Mortgage term	<input type="text"/> Yrs <input type="text"/> Mths	Does your client require a revaluation?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Repayment type	Repayment <input type="checkbox"/>		
	Interest only <input type="checkbox"/>		

## Buy to Let information

Buy to Let property address

Address

Rental Income  
(Buy to Let Only)

£

Post code

## New Platform mortgage product required

Full product description

Product code

Interest rate

 %

Product fee

£

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

Yes

No

Card Payment

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 cheque, please include with application form made payable to Platform, if paying by card we will call your client before completion for card details.

Cheque Enclosed

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 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.

## 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

## 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 Broker Support Team on 0345 070 1999 (Option 1).

Please tick your application submission route:

Connells  Countrywide  First Complete  Ingard  Intrinsic

Openwork  Personal Touch  Pink AR  Sesame  Tenet

Home in One Financial Services Limited  Positive Solutions  Mortgage Advice Bureau

Stonebridge Mortgage Solutions Ltd  Life and Easy Ltd  CAERUS Financial Limited

Mortgage Intelligence AR Network  Mortgage Next

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

The Buy To Let Business

## Declaration

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

Broker fee (charged directly to your customer) £

I confirm that I am acting on behalf of the applicant(s) in connection with mortgage requirements and 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 terms of the Data Protection Act applicants have the right to obtain a copy of the information held about them upon payment of the appropriate fee.

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 KFI and offer document. Your client will need to check and sign before sending back to us 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 03457 213 213\* (8am – 8pm Monday to Friday and 9am – 12 noon on Saturday) 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 0800 and 0808 numbers are free from landlines and mobiles. Calls to 03 numbers cost the same as calls to numbers starting with 01 and 02. Calls to 0845 and 0870 numbers cost 3p per minute, plus your phone company's access charge. Calls to 0844 and 0843 numbers cost 7p per minute, plus your phone company's access charge. Calls may be monitored or recorded for security and training purposes.

Information correct as at 06/2017.