

Rate Switch Product Selection Form



Please complete and return this form to rateswitch@thetipton.co.uk

Once the form is fully completed and received by us, we'll process your request within three working days. Without this fully completed form, we'll be unable to progress your request further.

If you have not submitted business with us within the last 12 months, you will not be registered as a broker with the Society. Please also ensure you complete our Mortgage Intermediary Registration Form.

Customer and Adviser Details

Account number	<input type="text"/>
Applicant(s) name	<input type="text"/>
Adviser name	<input type="text"/>
Company name	<input type="text"/>
FCA number	<input type="text"/>

Rate Switch Product Selection

How was your advice given to the applicant(s)? Face to face Telephone In Writing

Product applied for	Product code	<input type="text"/>
	Product description	<input type="text"/>

Where arrangement or administration fees apply, you have the choice of adding to the mortgage balance or paying upon completion. If you choose to add the fees to the mortgage, these will be payable over the term of the mortgage, and you will be charged interest on the amount outstanding.

Arrangement fee £ Add fee to the mortgage Pay the fee upon completion

Please state any other fees that will be charged to the applicant(s)

Type of fee	<input type="text"/>	Amount	£ <input type="text"/>
Fee paid	On application <input type="checkbox"/>	On completion	<input type="checkbox"/>
Refundable	Yes <input type="checkbox"/>	No	<input type="checkbox"/>

Procurator Fee Payment

Please ensure the appropriate payment route is selected to guarantee that the correct procurator fee is paid on completion of the rate switch.

Payment of procurator fee Direct Principal Mortgage Club

Please indicate if this application is being submitted via one of the specific mortgage clubs listed to ensure that the procurator fee is paid on completion.

Mortgage Club

Please indicate the name of your Mortgage Club:

Additional Information

Adviser Declaration

- I confirm I have attained permission from the applicant(s) named above to submit a rate switch application on their behalf. I confirm that a Rate Switch Authority Form has been completed prior to submitting this Rate Switch Product Selection Form.
- I confirm that the personal data given for the applicant(s) named above is true to the best of my knowledge and belief. I undertake to advise the Society immediately of any changes to the personal data I have provided in this rate switch application.
- I confirm I am authorised to act on behalf of the applicant(s) named above relating to this particular rate switch application and I am acting within my authority.
- The personal data for the applicant(s) named above will only be used in conjunction with the needs of the applicant(s). I accept responsibility for the security of any personal data provided to me.
- I confirm that I/my company have/has the necessary permissions from the FCA to advise, complete and submit this rate switch application to the Society on behalf of my/our clients.
- Based on my knowledge of the applicant(s) the rate switch is suitable for the applicant(s).

Adviser signature	<input type="text"/>	Date	<input type="text"/>
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Strictly for intermediary use only.