

# Porting application form

Please read the enclosed information with care.

## Section one - submission route details

Existing mortgage reference number:

## Section two - applicant details

Number of applicants 1  2

### First applicant details

Title  Surname

First name  Middle name(s)

Marital status  Previous names (optional)

Phone number (daytime)  Mobile number

Email address

Preferred method of contact Telephone  Email

### Second applicant details

Title  Surname

First name  Middle name(s)

Marital status  Previous names (optional)

Phone number (daytime)  Mobile number

Email address

Preferred method of contact Telephone  Email

### Section three - your current property

Current value that your property is being marketed for, or, sale price that has been agreed for your property

£

Please include a copy of the listing for the property, and, or a URL to the online listing for the property

### Section four - new property porting loan requirements

Purchase price

£

Estimated completion date

DD / MM / YYYY

Additional borrowing required?

Yes

No

Additional amount and loan reason

£

If you would like to discuss the options available to you with regards to additional borrowing, please contact your financial adviser.

### Section five - new property details

Full property address (inc. postcode)

#### Property details

Property type (detached house, flat etc)

Year property built (if under 10 years ago, please state which warranty is in place e.g. NHBC, Zurich etc)

Number of bedrooms

Tenure (if leasehold, please state the number of years remaining on lease)

Is the property under construction?

*Section continued on next page*

## Section five - new property details (cont.)

Is the property a listed building? If yes, please provide details

Does the property have more than 5 acres of land? If yes, how many?

Is the property ex local authority or ex MOD?

Are there any agricultural restrictions or restrictions on occupancy? (Retirement village, sheltered accommodation)

### Property Construction

Wall type (brick, stone, timber etc)

Roof type (slate, tile, thatched etc)

Has the property flooded in the last 5 years?

Is the property at risk of erosion, subsidence, heave or landslip?

Does the property have solar panels? If yes, will these be owned outright or leased?

Does the property have an annexe?

Are service charges payable? If yes, please provide details

Is ground rent payable? If yes, please provide details

## Section six - how will the new property be insured?

no insurance  \*buildings only  buildings and Contents  contents only

\*Buildings insurance must be on risk at exchange of contracts.

## Section seven - how will the new property title be registered?

joint tenancy  tenancy in common  single title owner

## Section eight - residency and other occupants

Will the property be your main residence?

Will the property be used for commercial purpose? If yes, please provide details

Will there be any other occupants, not party to the mortgage living in the property?\*

If yes to the above, please provide the name(s), date of birth(s) and relationship to the applicant(s) for all occupants residing at the property

\*Occupiers aged 17 or older will need to sign a deed of consent, the deed of consent will need to be signed by an independent legal adviser, the legal adviser must be different to your solicitor/conveyancer.

## Section nine - vendor / estate agent details (for new property)

Name of vendor/estate agent

Contact name

Company address

Telephone number

Email address

## Section ten - solicitor / conveyancer details

Name of solicitor / conveyancer

Contact name

Company address

Telephone number

Email address

## Section eleven - declaration

For the most recent detail on how your personal data is processed and protected, and your rights surrounding this data, please refer to [equityrelease.royallondon.com/policies/privacy-policy](https://equityrelease.royallondon.com/policies/privacy-policy). This page also details how you can make a request in line with your individual rights under data protection legislation.

How Royal London Equity Release will use your personal data:

We are the data controller and need to collect information about you so that we can understand your circumstances, requirements and for certain other specified purposes. This section tells you why we ask for information, who we provide it to, the purposes that it may be used for and explains how we will protect your privacy. If you wish to contact us to discuss any of the following details please call us on (0330) 1243914, or write to us at PO BOX 277, Sheffield, S98 1RP.

We may obtain a variety of information about you that may include (but is not limited to) information relating to your financial circumstances (for example, your income, outgoings and existing investments), gender, dependents and marital status. We may also ask you about sensitive data such as your physical and mental health. Collecting this information not only enables us to offer you a Royal London Equity Release Lifetime Mortgage, but also to service the loan once it has completed.

Data protection laws gives you the right to see any personal data that we hold about you. You have the right to request that the data controller provide the data subject with his/her personal data and where possible, to transmit that data directly to another data controller. You have the right to require any inaccuracies in personal data relating to you to be corrected and to request a restriction is placed on further processing where there is a dispute to that accuracy.

You have the right to prevent processing of sensitive and personal data for the purposes of direct marketing. You have the right to lodge a complaint with the Information Commissioners Office.

In order to offer you a Royal London Equity Release Lifetime Mortgage, we will need to share your data with other third parties including: our property valuers, our conveyancing partners, our insurers, our funders, our credit referencing partners, your adviser, your conveyancing firm. Please note there may be other parties we need to share your data with, but this will only be in connection with your Lifetime Mortgage.

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. Further details of how your information will be used by us and these fraud prevention agencies, and your data protection rights, can be found by contacting us on the afore-mentioned contact details.

In order to lend on a property, Royal London Equity Release ('we', 'us') only require a mortgage valuation to be carried out. We do not instruct a survey of any kind. We will instruct a third party valuer of our choosing. It's important to remember that the mortgage valuation is a report which is purely for our purposes in accordance with the mortgage Valuation guidelines issued by the Royal Institution of Chartered Surveyors and the guidelines we issue to our valuers. This does not meet RICS guidelines for any of the survey products they offer, such as their homebuyer and building survey reports and is unsuitable for use by you.

Any information received about you (either directly or from a third party) as a consequence of

*Section continued on next page*

## Section Eleven - Declaration

providing you with your Lifetime Mortgage may be used by us for purposes set out below:

1. To provide you with information about the products you have taken out
2. To perform initial and any future credit checks and to verify your identity
3. To comply with legal and regulatory obligations
4. For the administration and continuing review of your plan
5. For analysis and research, to improve the way we do business
6. To provide you with information about products and services that may be of interest
7. For general administrative purposes, including the storage and backup of data

Any credit reference check may affect your credit rating.

We will hold your personal data for no longer than is reasonably necessary to continue servicing your Lifetime Mortgage. Your personal data will be deleted within 7 years of your Lifetime Mortgage contract ceasing.

### Customer declaration

To my/our knowledge the information submitted on this mortgage application is accurate and correct.

All parties confirm Royal London Equity Release has authority to undertake fraud and credit checks in order to assess my/our suitability to offer me/us their Lifetime Mortgage.

All parties confirm Royal London Equity Release can use my/our personal data in accordance with the principles set out above.

I/ We declare we have read and understood the above declarations.

Applicant 1

Name  Signed  Date

Applicant 2 (if applicable)

Name  Signed  Date

### Valuation details

Arrangements to access property, please provide details for the valuer to gain access to inspect the property. Example: This could be the estate agents' details).

Contact  Contact name

Contact telephone number

Please provide any additional information which will help the valuer to gain access.

Best time to conduct survey