Intermediary Porting Request Form

THE CAMBRIDGE Building Society

Where you have requested to port your customers existing mortgage, we require the following details and declarations to be completed.

FOR INTERMEDIARY USE

Section one: Porting request

Existing mortgage account number

Customer name(s)

1. Please tick which is appropriate;

☐ like for like balance transfer and porting existing mortgage product

☐ existing balance transfer and porting existing mortgage product with additional borrowing (a fee may be applicable please see section five)

☐ reducing existing balance and porting existing mortgage product (overpayment charges may apply)

If your customer is on a product with no early repayment charges and they choose not to port their existing product, the Redemption Administration Fee of £60 will be charged when redeeming their existing mortgage. This will not be treated as a porting request.

Section two: Existing mortgage changes

How many loan parts does the existing mortgage have?

Where more than one part and reducing the balance, which part does this impact?

Are any changes being made to the existing mortgage term? Yes ☐ No ☐

If additional borrowing, please confirm the mortgage term for this new part?

If any other changes are to be made to the existing mortgage, please advise:

Section three: New product

If your customer is increasing their mortgage balance, a new product will need to be chosen for the additional borrowing, based on the overall LTV.

Please confirm the product chosen: Additional Borrowing amount: £

Section four: Credit checks and use of personal data

Please tick the following to confirm:

☐ I can confirm that my customer(s) consent to credit checks being completed by The Cambridge Building Society. Full details about credit referencing at The Cambridge and how The Cambridge uses customer information and their data rights are contained in The Cambridge Building Society Privacy Policy, which I have provided to my customers and have confirmed a copy will be emailed during the application process.

Section five: Fees

For customers who are increasing their mortgage and have selected a new product, reduced fees will apply. As your customer is an existing Cambridge member, the fee payable on the new product will reflect the additional borrowing fee only, and an application fee is not due.

This can either be added to the loan or paid-up front. Details of our products and fees can be found at cambridgeforintermediaries.co.uk/products. If a fee is applicable, please complete the details below:

	Fee to be paid	Amount due	Pay upfront or add to loan
Additional borrowing fee	Yes No	£	Upfront Add
CHAPS fee*	Yes	£25	Upfront Add
Intermediary Fee	Yes No	£	N/A

*Only payable where there is additional borrowing.

Section six: Intermediary declaration

By submitting an application form and completing this form you're confirming that you have the customers authority to do so, and that the information has been provided by the customer(s) for this purpose.

- [ ] I declare that I've read and agree to the Intermediary Terms and Conditions
- [ ] I understand that The Cambridge Building Society only processes customers personal information in accordance with data protection laws
- [ ] I declare that I'm aware that quality checks will be carried out on the validity of the information contained in the Mortgage Application
- [ ] The customer(s) confirm(s) that they are of sound mind and are not excluded from proceeding with a Full Mortgage Application with The Cambridge Building Society
- [ ] I declare that I understand that by agreeing to be bound by the Intermediary Terms and Conditions and submitting Mortgage Applications to The Cambridge, I am contracting with The Cambridge for myself as an Intermediary, and also for and on behalf of my Principal (as defined in the Intermediary Terms and Conditions) as its agent
- [ ] I declare that I am authorised to bind my Principal as set out above

Both the Intermediary Terms and Conditions and Privacy Policy can be found on our intermediary website cambridgeforintermediaries.co.uk

Intermediary name	
Intermediary signature	
Date	

This form requires a wet signature.