

# Application Amendment Form

## Amending your client's mortgage application

Once you have submitted an application to us, please use this form if you need to amend the details of your client's mortgage application.

1. Complete the section titled "Application details"
2. Tick the section(s) below that you wish to amend and give a brief summary of why the change is required
3. Complete the relevant data fields for each section of the application that you wish to change (you do not need to fill out the whole form)
4. Upload a scanned copy of the document via the secure upload facility on the Case Summary screen within the HSBC intermediary platform

Depending on the nature of the changes being made, a further credit check and further supporting document(s) from the applicant(s) may be required. By submitting this form, you are confirming that you have obtained the customers' consent to a further credit check.

### If you need to change any of the following we cannot process your change via this form and you must submit a new mortgage application:

A significant change to an applicant's first name, surname or previous name

To add or remove an applicant

To change the type of borrowing, e.g. change from Purchase to Remortgage or Residential to BTL

To discuss whether a new application is required please contact the BSO Helpdesk on 0345 600 5847.

## Application details

Application number:

Applicant 1:

Applicant 2:

Broker Name:

Broker Firm:

Form completed by:

Broker

Deputy

Admin

By submitting this request to HSBC you are confirming that any associated advice has been provided to the applicant(s) and that the applicant wishes to proceed on the terms you have stated within this form.

## Application Section(s) to be amended

Customer details	<input type="checkbox"/>	Income & expenditure	<input type="checkbox"/>	Loan requirements	<input type="checkbox"/>
Product(s)	<input type="checkbox"/>	Fee arrangements	<input type="checkbox"/>	Property details	<input type="checkbox"/>
Bank account details	<input type="checkbox"/>	Other	<input type="checkbox"/>		

## Why is the change required?

## Changes to customer details

	First Applicant	Second Applicant
Title (e.g.Mr/Mrs/Miss)	<input type="text"/>	<input type="text"/>
Forename(s)/given name(s)	<input type="text"/>	<input type="text"/>
Middle name(s)	<input type="text"/>	<input type="text"/>
Previous surname(s)	<input type="text"/>	<input type="text"/>
Home telephone number	<input type="text"/>	<input type="text"/>
Work telephone number	<input type="text"/>	<input type="text"/>
Mobile telephone number	<input type="text"/>	<input type="text"/>
Email address	<input type="text"/>	<input type="text"/>
Current address	<input type="text"/>	<input type="text"/>
<u>For British Forces Post Office (BFPO) addresses, please quote service number</u>	<input type="text"/>	<input type="text"/>
Correspondence address (if different to current)	<input type="text"/>	<input type="text"/>
Other change to personal circumstances	<input type="text"/>	

## Changes to loan requirements

If the loan amount changes we will re-assess affordability and the maximum amount of borrowing allowed may change.

Total mortgage amount required £

Property price or expected valuation £

Reason for any new additional borrowing

Where the loan amount has been reduced as a result of our assessment, please provide details of how the shortfall in the deposit amount will be funded?

By instructing any capitalisation of fees you are confirming that the customer is aware and consenting of this. If you require the application to be moved to a new product and fees apply to either the new or previous product, our team will need to return any refundable fees paid on the previous product and collect any new fees on the replacement product from the customer. We will notify you upon receipt of this form to advise of required action.

### Loan part 1

Change to product  Change to amount  Change to term  Change to repayment type

Loan amount  Loan term (years and months)

Repayment type Capital Repayment  Interest Only  Repayment strategy (add further info under other)

Product name (e.g. FXX11 - 2.50% Fixed Rate to 31.12.19)

Add product fee to mortgage  Fee to be paid up front

### Loan part 2

Change to product  Change to amount  Change to term  Change to repayment type

Loan amount  Loan term (years and months)

Repayment type Capital Repayment  Interest Only  Repayment strategy (add further info under other)

Product name (e.g. FXX11 - 2.50% Fixed Rate to 31.12.19)

Add product fee to mortgage  Fee to be paid up front

If the mortgage has more than 2 parts please attach a further copy of this page with your submission.

## Changes to property details

Is this a change of property or an amendment to the existing property?

New

Existing

**IF NEW, PLEASE COMPLETE THIS SECTION IN FULL**

Purchase price

Approx. year built?

Property address

Which best describes the property?

House

Bungalow

Flat

Maisonette

Property tenure

Freehold

Other

Remaining term on lease

Leasehold

Please indicate ground under expenditure in the next section

Which best describes the property? Terraced  Mid-terrace  Semi-detached  Detached   
End-terrace  Converted  Purpose-built   
(e.g. flat/maisonette) (e.g. flat/maisonette)

Which best describes the construction of the property? Standard  Non-standard

Building construction Brick/Stone (conventional)  Other (non-conventional)

Roof construction Tile/Slate (conventional)  Other (non-conventional)

Is the property a new build/ less than 2 years old? Yes  No  If yes, is the builder offering any incentives? (Please enter amount) Yes  No

Primary residence  Secondary residence  Number of bedrooms

Is the property to be used for residential use only? Yes  No  Is the property being purchased a discount (e.g. from a family member?) Yes  No

Is the property being occupied for the first time? Yes  No  Has the property been converted? (e.g. flat/maisonette) Yes  No  How many stories in the property? (e.g. flat/maisonette)

Contact details for valuation

## Changes to income/expenditure

Change to income

Change to expenditure

Nature of change(s)

### Change to bank account details (for direct debit)

Please note: The details provided below must relate to one or both of the applicants

New details  
Sort Code

Preferred monthly  
payment date:

Account number

Account holder(s)

Name of bank

### Changes to Solicitor details

The legal representative must already be on our panel, or if they are not already on our panel, they must be acceptable to us. Please contact our helpdesk on 0345 600 5847 if you are unsure of the status of the chosen legal representative

Firm name

Solicitor name

Contact number

Address

### Changes to other details

Please use this space to tell us about any other changes to the mortgage application and/or the applicants circumstances. Please provide as much information as possible.