

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. Please note that change of solicitor details can be accepted via the telephone by calling the Broker Support Helpdesk on 0345 600 5847.

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:

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

Product(s)

Fee arrangements

Loan requirements

Bank account details

Other

Property details

Why is the change required?

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
(including any fees to be added) £

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)

Product Code

Add product fee to mortgage Fee to be paid up front Fee Saver

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)

Product Code

Add product fee to mortgage Fee to be paid up front Fee Saver

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 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