HSBC UK

Application Amendment Form

Amending your customer's mortgage application

Once you have submitted an application to us, please use this form if you need to amend the quote of your customer mortgage application. Please refer to our Intermediary website for how to make other changes.

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 checked there has been no change to the customer(s) circumstances. If there has been any change to the customer(s) circumstances please notify us. You are also confirming that you have obtained the customers' consent to a further credit check (if required). Any requested changes will be subject to a further underwriting assessment.

1. Check the Loan section of the Residential lending criteria to ensure that any changes are within our LTV policy restrictions
2. Complete the section titled "Application details"
3. Tick the section(s) below that you wish to amend and give a brief summary of why the change is required
4. 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)
5. Upload a scanned copy of the document via the secure upload facility on the Case Summary screen within the HSBC intermediary platform
6. Where an application has been approved and completion is imminent, if an amendment to the lending is requested, you must ensure any acting Solicitors / Conveyancers are informed of the change.

If your request is for any of the reasons below, we would not be able to action this via this form, you must submit a new mortgage application in these instances:

- To add or remove an applicant
- To change the type of borrowing, e.g. change from Purchase to Remortgage or Residential to BTL
- If we have already received the Certificate of Title from the Solicitors acting.
- If a previous offer extension has been approved, no further changes can be made beyond the original offer expiry date.

Please be aware that any revised offer that is generated will retain the original offer expiry date.

You must inform us if you wish to cancel a submitted case. Many of our processes in the application journey are now automated, therefore the case may reach completion if you do not advise us that it should be cancelled.

To discuss whether a new application is required, or to cancel a case, please contact the Broker Support 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 ☐

Property details ☐ Other ☐

Offer Extension Request - Purchase cases only ☐

Apply up to 30 days before original offer expiry date. An offer extension request can be made for 90 days for a New Build (under construction) property or 30 days for a non-New Build property. Please note only one Offer Extension is permitted per application.

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. Where you are requesting an increase in lending, if the overall LTV remains within the original LTV bracket then you can retain the original rate (for the original amount). Any new lending will require a current rate.

Please note: If capitalising the booking fee, the total lending amount must not breach maximum salary multiples or a 95% LTV policy limit.

Total mortgage amount required (including any fees to be added) **£**

Purchase price (purchase cases only) **£**

Estimated valuation (for non-purchase cases) **£**

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

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 ☐

If requesting an increase to the lending please check the rate selected. If wanting to keep the current rate is this still available and still applicable for the overall LTV?

Repayment type (add further info under other) _____

Product name (e.g. 00410XXXXXX - 4.61% Fixed Rate to 31.05.27) _____

Product Code _____

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

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 a different fee amount applies to the new 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 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 ☐

If requesting an increase to the lending please check the rate selected. If wanting to keep the current rate is this still available and still applicable for the overall LTV?

Repayment type (add further info under other) _____

Product name (e.g. 00410XXXXXX - 4.61% Fixed Rate to 31.05.27) _____

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 another copy of this page with your submission.

Changes to property details

Please note that if a revised offer is issued for a new property address, the offer will retain the original offer expiry date. A new application would be required if you wish to apply for an offer, on the new property, valid for 180 days.

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?

For BTL only expected monthly rental income

Where an increase to the deposit is required to complete the purchase, please provide details of how this will be funded

Property address

Which best describes the property? House ☐ Bungalow ☐ Flat ☐ Maisonette ☐

EPC/ PEA Rating if A or B rated property A ☐ B ☐

Property tenure Freehold ☐ Leasehold ☐ Other

Please indicate ground under expenditure in the next section

Remaining term on lease

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

Which best describes the construction of the property?

Standard ☐ Non-standard ☐

Which best describes the building construction? Brick/Stone (conventional) ☐ Other (non-conventional) ☐

Which best describes 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 ☐ £ ☐

Is it your primary residence? ☐ Is it your secondary residence? ☐ Number of bedrooms ☐

Is the property to be used for residential use only? Yes ☐ No ☐

Is the property being purchased at a discount (e.g. from a family member?) Yes ☐ No ☐

Is the property occupied for the first time? Yes ☐ No ☐

Has the property been converted? (e.g. flat/ maisonette) Yes ☐ No ☐

How many storeys in the property? (e.g. flat/maisonette) ☐

Contact details for valuation

☐