

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. 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

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

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) | <input type="checkbox"/> | Fee arrangements | <input type="checkbox"/> | Loan requirements | <input type="checkbox"/> |
| Bank account details | <input type="checkbox"/> | Other | <input type="checkbox"/> | Property details | <input type="checkbox"/> |

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.

PLEASE NOTE: If capitalising the booking fee, the total lending amount must not breach any policy LTV limits and/or maximum salary multiples

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?

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

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? If current rate is no longer available then please select a new rate (either for total lending or just for the additional amount if LTV is unaffected).

Repayment type (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

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? If current rate is no longer available then please select a new rate (either for total lending or just for the additional amount if LTV is unaffected).

Repayment type (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 another 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? For BTL only expected monthly rental income

Property address

Which best describes the property?

House Bungalow
Flat Maisonette

Property tenure Freehold Other
Leasehold

Remaining term on lease

Please indicate ground under expenditure in the next section

Which best describes the property? Terraced Mid-terrace Detached Semi-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 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 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