

## Intermediary application amendment form

### How to make an amendment to your client's mortgage application

Please use this form to amend the details of your client's mortgage application.

- 1 Tick the section(s) below that you wish to amend.
- 2 Complete the relevant page(s) for each section of the application that you wish to amend. **If changes are being made to the Destination of Funds, please ensure that the applicant(s) signs the appropriate page.**
- 3 Complete the Mortgage intermediary declaration below.
- 4 Send this covering sheet, the relevant pages detailing your amendments and any supporting documentation to us using the secure document upload facility at [coventryforintermediaries.co.uk](http://coventryforintermediaries.co.uk) or by post to: CSC New Lending, Godiva House, Binley Business Park, Harry Weston Road, Coventry CV3 2TQ.

If you need to change any of the following **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 an applicant's date of birth.
- To change the type of borrowing, e.g. change from Residential to Buy to Let/Mover to First Time Buyer.

\* A significant change is a change that would result in a different record being returned on a credit search, e.g. Smith to Jones or Pearce to Pierce. For further guidance, please contact Coventry for intermediaries on 0800 121 7788 (please check our website for our opening hours).

### Application section(s) to be amended

Applicant's personal details	<input type="checkbox"/>	Property details	<input type="checkbox"/>	Fee arrangements	<input type="checkbox"/>
Loan requirements	<input type="checkbox"/>	Valuation details	<input type="checkbox"/>	Other changes	<input type="checkbox"/>
Destination of funds	<input type="checkbox"/>	Legal representative details	<input type="checkbox"/>		

### Mortgage intermediary declaration

By completing and returning this form, I declare and understand that:

- To the best of my knowledge the information is true and correct, and has been submitted to you with the knowledge and permission of the applicant(s).
- The application will be re-assessed on the basis of any requested amendment and may affect the amount the Company is prepared to lend.
- It is my responsibility to advise the applicant(s) on the suitability of the mortgage (based on the amendments requested).
- It is my responsibility to check the Company's lending policy before submitting an application (or any amendment to an application).
- Fees are not refundable.
- I confirm that I have read and agree to the Terms of Business as stated on [coventryforintermediaries.co.uk](http://coventryforintermediaries.co.uk)

Application number

Application name(s)

Please check our website for our opening hours. Calls to 0800 numbers are free when made from the UK. You may be charged for calls to all other numbers, please contact your service provider for further details. We may monitor, record, store and use telephone calls to help improve our service and as a record of our conversation.



## Change to the applicant's personal details

You **must** submit a new application form if any of the following change:

- Significant\* changes to an applicant's first name, surname or previous name.
- To add or remove an applicant.
- To amend an applicant's date of birth.

\* A significant change is a change that would result in a different record being returned on a credit search, e.g. Smith to Jones or Pearce to Pierce. For further guidance, please contact Coventry for intermediaries on 0800 121 7788 (please check our website for our opening hours).

If the changes relate to more than two applicants please complete a second sheet.

**Application number**

**Applicant name(s)**

**First applicant**

**Second applicant**

Title (Mr/Mrs/Miss/Ms/Other)



First name(s)



Surname



Previous surname(s)



Home telephone number



Work telephone number



Mobile telephone number



Email address



Current address

House name/number



Flat number



Building name



Street



Town/City



County



Postcode



For British Forces Post Office (BFPO) addresses, please quote service number



Please complete the declaration on the covering sheet and send it to us along with these amendments.



## Change to the loan requirements - page 1 of 2

Application number

Applicant name(s)

You **must** submit a new application if the type of borrowing is to change e.g. Residential to Buy to Let/Movers to First Time Buyer.

### Loan details

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

Total mortgage amount required

Property purchase price or expected valuation

Term of mortgage needed

Years

Months

Is the property a new build, conversion or renovation that has been built in the last two years or will be occupied for the first time?

Yes

No

Reason for additional borrowing

Home improvements

Debt consolidation

Green energy efficiency home improvements (to the mortgaged property)

Purchase another property (Residential)

Purchase another property (Buy to Let)

Buying Freehold or extending lease

Purchase of Equity

Purchase of land (adjoining current property)

Purchase of land (not adjoining current property)

School fees

Purchase additional share of property

Redeem a loan secured on the property

Essential repairs

Other (please give details)

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?

### Mortgage scheme and repayment plans

- Please check that the loan still meets any LTV criteria.

	Product name	Interest rate	Repayment amount	Interest-only amount	Term
1		%	£	£	Yr Mth
2		%	£	£	Yr Mth
3		%	£	£	Yr Mth
4		%	£	£	Yr Mth

Note: when completing product name please quote both product code and name e.g. FXX11 - 2.50% Fixed rate to 31.12.20

Please complete the declaration on the covering sheet and send it to us along with these amendments.



## Change to the loan requirements - page 2 of 2

Where any lending is on an Interest-only basis we will require evidence of the applicant's repayment plans.

Please confirm how the mortgage will be repaid at the end of the term?

Sale of property

(If you have ticked this box please answer question 7 only)

Stocks and shares ISA

(If you have ticked this box please answer questions 8 - 12)

Sale of unencumbered UK residential property

(If you have ticked this box please answer questions 1 - 6)

UK pension\*

(If you have ticked this box please answer questions 8 - 9, 11 - 12)

Endowment Policy

(If you have ticked this box please answer questions 8 - 9, 11 - 12)

UK FTSE listed securities

(If you have ticked this box please answer questions 8 - 9, 11 - 12)

Unit Trust/OEIC/Investment Trust

(If you have ticked this box please answer questions 8 - 12)

\*For your UK Pension please enter either 12.5% of the current statement value of a defined contribution benefit pension scheme or 50% of the guaranteed lump sum defined benefit pension scheme.

1. Estimated value of the property to be sold

£

2. Which best describes the property? Detached

Semi-detached

Mid-terrace

End-terrace

Quad

Converted

(e.g. flat/maisonette)

Purpose-built

(e.g. flat/maisonette)

3. Which best describes the construction of the property?

Standard

Non-standard

4. Number of bedrooms

5. Title register (Deeds) number

6. Property address

House number

House name

Flat number

Building name

Street

Town/City

County

Postcode

7. Amount being used to repay the loan (only applicable to sale of property)

£

8. Current value of repayment plan

£

9. Policy provider

10. How much is paid into the plan each month?

£

11. Maturity date

12. Policy/Account number

£

Please complete the declaration on the covering sheet and send it to us along with these amendments.



## Change to destination of funds

Application number

Applicant name(s)

You **must** obtain the applicant(s) written authority to make this change. Please ask the applicant(s) to sign the declaration below. Please note: Where a legal representative is required, the funds will normally be released directly to them.

### New details

Sort code  -  -

Account number

Account holder(s)

Reference

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## Customer declaration

I/We instruct you to send the funds on completion of the mortgage to the above account.

	First applicant	Second applicant
Signature(s)	<input type="text"/>	<input type="text"/>
Print name(s)	<input type="text"/>	<input type="text"/>
Date	<input type="text"/>	<input type="text"/>

If there are more than two applicants please capture the additional signatures on a second sheet.

Please complete the declaration on the covering sheet and send it to us along with these amendments.



## Change to the property details - page 1 of 2

Application number

Applicant name(s)

Please only complete the sections that are changing.

Where is the property located? England  Scotland  Wales  Northern Ireland

Address House number  House name

Flat number  Building name

Street

Town/City

County  Postcode

Are you buying the property from a Society in which you own an interest and/or are a shareholder? Yes  No

Which best describes the type of property?  
House  Bungalow   
Flat (please answer questions 1-2 below)- studio flats are not allowed  Maisonette (please answer question 2 below)   
Other (please give details)

1. How many storeys in the block?

On which floor is the flat located?

2. Was the property previously owned by a local authority or social landlord? Yes  No

Property tenure Freehold

Leasehold

Remaining years left on lease

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

If the property is a new build, detail plot number, if known Plot number

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

End-terrace  Quad  Converted (e.g. flat/maisonette)

Purpose-built (e.g. flat/maisonette)

Number of bedrooms

Number of living rooms

Does the property have a garage? Yes  No

Is this a porting application? Yes  No

Please confirm if the property is sheltered accommodation Yes  No

If yes, does the property have any age restrictions? Yes (please give details below)  No



## Change to the property details - page 2 of 2

Will anyone aged 17 and over who is not named on this mortgage, live at the property? (Residential only)

Yes

No

If yes, please list names  
(please continue on page 20 if necessary)

Name	Date of birth

Note: An Agreement & Undertaking form will need to be signed by each of the non-owning occupiers aged 17 and over. The necessary form(s) will be issued with the offer and will need to be signed by each of the non-owning occupiers and returned to our Completions Department before we release the funds.

Please complete the declaration on the covering sheet and send it to us along with these amendments.



## Change to valuation details

Application number

Applicant name(s)

Who should the valuer contact to arrange access to the property?

Vendor

Estate Agent

Applicant

Builder

Landlord

Tenant/  
contract-

Other

holder

Name of contact

Contact number

Any other information  
(contact evenings only etc)

Alternative contact number

Address House number

House name

Flat number

Building name

Street

Town/City

County

Postcode

We will instruct a valuation once we've reviewed your application. The valuation is for our benefit only and used to confirm whether we can lend on the property. It's important to remember that we decide the type of valuation most appropriate to the application, therefore a physical inspection of the property may not be required.

Please complete the declaration on the covering sheet and send it to us along with these amendments.





## Change to legal representative 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 Coventry for intermediaries on 0800 121 7788 (please check our website for our opening hours) if you are unsure of the status of the chosen legal representative.

**Application number**

**Applicant name(s)**

Name of contact

Society name

Address House number

House name

Flat number

Building name

Street

Town/City

County

Postcode

Please complete the declaration on the covering sheet and send it to us along with these amendments.



## Change to fee arrangements

Application number

Applicant name(s)

Product name

(e.g. FXX11 - 2.50% Fixed Rate to 31.12.20)

Product fee

Add to mortgage

Deduct from advance (loan)

Funds transfer fee

Add to mortgage

Deduct from advance (loan)

Product name

(e.g. FXX11 - 2.50% Fixed Rate to 31.12.20)

Product fee

Add to mortgage

Deduct from advance (loan)

Product name

(e.g. FXX11 - 2.50% Fixed Rate to 31.12.20)

Product fee

Add to mortgage

Deduct from advance (loan)

Product name

(e.g. FXX11 - 2.50% Fixed Rate to 31.12.20)

Product fee

Add to mortgage

Deduct from advance (loan)

Please complete the declaration on the covering sheet and send it to us along with these amendments.



**Other changes**

**Application number**

**Applicant name(s)**

Please use this space to let us know about any other changes to the mortgage application form. Please provide as much information as possible.

Please complete the declaration on the covering sheet and send it to us along with these amendments.

