

## Repaying your Interest-only mortgage

Please complete this form to let us know how you will repay your Interest-only mortgage. We will use this information to assess your mortgage application. Please note, we will only accept the repayment plans listed below.

**We are unable to provide any investment advice in relation to your repayment plans and we do not accept any responsibility for the performance of your chosen repayment plans. It is your responsibility to regularly check the performance of any plan you are using to make sure you are able to repay the outstanding balance of your mortgage at the end of the mortgage term.**

Once you have completed this form and signed overleaf, please return it to your financial advisor, together with your supporting documentation.

**This completed form and your mortgage application will be read together and will form the basis upon which any offer will be made to you.**

Customer name(s)	<input type="text"/>		
Case ID/Account number	<input type="text"/>		
Mortgage amount	£	<input type="text"/>	
Amount on Interest-only	£	<input type="text"/>	
Term (years/months)	Years	<input type="text"/>	Months <input type="text"/>

Please tick the option(s) you intend to use to repay your mortgage. Please ensure you provide the proof of plan required as listed below.

Repayment plan to be used (please tick)	Amount to be used from repayment plan	Proof of repayment plan required
Stocks & Shares ISA <input type="checkbox"/>	£	Please provide a copy of an account statement issued by the product provider dated within the last 12 months.
Endowment policy <input type="checkbox"/>	£	Please provide a copy of a statement issued by your policy provider dated within the last 12 months.
Unit Trust/OEIC/ Investment Trust <input type="checkbox"/>	£	Please provide a copy of an account statement issued by the product provider dated within the last 12 months.
Current value <input type="text"/>		
Monthly contribution <input type="text"/>		
UK FTSE listed securities <input type="checkbox"/>	£	Please provide a copy share certificate, nominee account statement or confirmation of share holdings from a registered stock broker. This must show evidence of your share holding plus their valuation. Please note only UK based investments quoted in the FTSE index are acceptable.
Current value <input type="text"/>		
Monthly contribution <input type="text"/>		
UK Pension	Lump sum total £	Please provide a copy of a statement issued by your pension provider dated within the last 12 months.

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Repayment plan to be used (please tick)	Amount to be used from repayment plan	Proof of repayment plan required
Sale of unencumbered UK residential property <input type="checkbox"/>	£	Address
		Postcode
		Note: we will only accept 60% of the current property value for the repayment plan. The valuation will be determined by a desk top valuation.
		Property type (eg purpose-built flat, converted flat, terraced house, detached house, etc)
		Property construction
		Number of bedrooms
		Title Register (Deeds) number
Sale of property <input type="checkbox"/>		Only acceptable on residential Interest-only specific products.

**Acceptable Interest-only plans must be paid in Pounds Sterling.**

**Please note that we cannot process your application on an Interest-only basis until we receive this completed form and the necessary supporting documentation.**

## Customer Declaration

I/We confirm that to the best of my/our knowledge the above information is correct.

I/We confirm that the above repayment plan(s) will be kept in place and will be used to repay the capital outstanding on or before the end of the mortgage term unless I/we advise you to the contrary. If I/we cancel the repayment plan(s), stop paying into it or expect a shortfall, I/we will either set up an alternative plan or contact you to transfer to a capital repayment basis. I/We accept that it is my/our responsibility to ensure I/we have sufficient means to repay the capital at the end of the loan term.

I/We agree to provide to you any evidence you may reasonably request, during the term of the mortgage, to confirm that the repayment plan(s) remain valid and suitable to repay the capital outstanding at the end of the mortgage.

I/We agree that a credit reference agency check may be undertaken in support of this application.

## Signed

Applicant one	<input type="text"/>	Date	<input type="text"/>
Applicant two	<input type="text"/>	Date	<input type="text"/>

**Please pass this completed form and all supporting documentation to your financial advisor for them to send to us by:**

- using our document upload facility, scan and upload on our website; or
- send using our secure mail service to documents@thecoventry.co.uk (please ensure the mortgage account number or application number is included when sending via email); or
- post to CSC New Lending, Godiva House, Binley Business Park, Harry Weston Road, Coventry CV3 2TQ.

## Office use only

Checked by	<input type="text"/>	Date	<input type="text"/>
Calculation outcome	<input type="text"/>		
Decision	<input type="text"/>		