

# Intermediary ESIS request



## Details of the Mortgage Intermediary giving advice to this customer on this mortgage application:

Level of service given      Advised ☐      Execution only ☐

Name of adviser \_\_\_\_\_ Email \_\_\_\_\_

Telephone \_\_\_\_\_ Mobile \_\_\_\_\_

Company name and address \_\_\_\_\_

Are you: ☐ Directly Authorised      Financial Services Register number \_\_\_\_\_

☐ Appointed Representative      Principal Firm name and address \_\_\_\_\_

Financial Services Register number \_\_\_\_\_

If you use a 'trading as' name please give details:

Do you wish to use a mortgage club, if so please confirm which one: \_\_\_\_\_

Is there a fee payable by the customer to you?      Yes ☐      No ☐

If YES, please give amount      £ \_\_\_\_\_      When is the fee payable? \_\_\_\_\_

Is any of the fee refundable?      Yes ☐      No ☐      If YES, when and how much? \_\_\_\_\_

## Applicant details

	Applicant 1	Applicant 2
Title	_____	_____
First name(s)	_____	_____
Surname	_____	_____

## Mortgage details

Remortgage ☐      Purchase ☐      Product transfer ☐

Existing account number \_\_\_\_\_

Value/purchase price      £ \_\_\_\_\_

Address of property to be mortgaged \_\_\_\_\_

Loan details (please detail separately if split repayment) \_\_\_\_\_

Amount	Repayment method	Term in years	Product

Is a homebuyers report required?      Yes ☐      No ☐      Is the application fee to be added to the loan? (If applicable)      Yes ☐      No ☐

Will the advance be in stages?      Yes ☐      No ☐      If Yes, how many stages in total (including initial stage)? \_\_\_\_\_

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By completing this form, you are agreeing to our Privacy Notice and confirm you have advised your client of it's availability as below. The notice may be updated from time to time. The latest version is available via our website at [www.newbury.co.uk/privacy-notice/](http://www.newbury.co.uk/privacy-notice/), in any of our branches or by calling us on 01635 555700.

Newbury Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register number 206077). English Law applies and we will communicate with you in English. We are participants of the Financial Ombudsman Service. We have a complaints procedure which we will provide on request. Most complaints that we cannot resolve can be referred to the Financial Ombudsman Service. 7454