

Broker Authorisation Form

Mortgage account or application reference

Date Submitted

Security address

SELECT TYPE OF REQUEST

- | | | | |
|---|---|--|---|
| <input type="checkbox"/> Mortgage choices | <input type="checkbox"/> Change in repayment method | <input type="checkbox"/> Change of guarantors | <input type="checkbox"/> Transfer of equity |
| <input type="checkbox"/> Term extension | <input type="checkbox"/> Second charge consent | <input type="checkbox"/> Change in legal ownership | |

New term end date

Please discuss with the product transfer team if you're submitting multiple requests or if there's an outstanding request listed above which coincides with the Mortgage Choices request.

SELECT NEW PRODUCT

Mortgage product choice

Product fee (if applicable)

Fee to be added to the loan?

☐

Yes

No

BROKER DECLARATION

By submitting this form as Broker / Intermediary on behalf of the borrower(s) I confirm that:

- The regulatory authorisations required to fulfil my duties are current and there are no regulatory concerns, investigations or other actions including the cessation, termination or removal of any regulatory licence or approval.
- I have up-to-date professional indemnity insurance which conforms to the minimum requirements of the Financial Conduct Authority.
- I have been authorised by all borrowers to complete this application on their behalf.
- All information contained within this form is true to the best of my knowledge.
- I accept the terms and conditions of the Kent Reliance Brokers portal.

Please select whether the product transfer application is: ☐ advised ☐ non-advised

INTERMEDIARY DETAILS

If you would like to receive your copy of the Mortgage Choices Offer and Acceptance of Offer Form **via secure email** please tick this box.

You will also need to provide an email address and a mobile phone number.

Registered Company Name as per FCA*

FCA number

Name

Mobile +44

Email address

Correspondence address

*Please do not enter a trading style of the FCA registered company name.

INTERMEDIARY PAYMENT DETAILS

If you are Directly Authorised or an Appointed Representative of a non-partner network then failing to notify us which club you are submitting via will prevent your request from proceeding.

If you are an appointed representative of one of our partner networks (2 Plan Wealth Management, Connect IFA, Connells Group, Countrywide Principle Services Ltd, FYB Network, Home in One, John Charcol, Lighthouse Advisory Services, Mortgage Intelligence, Mortgage Next, New Leaf Distribution, Openwork, Primis, Quilter, Sesame), we will automatically pay the procurement fee via this route.

If you are Directly Authorised or an Appointed Representative of a non-partner network (not listed above) then please tick to confirm which mortgage club is your preferred payment route.

- | | | | | | |
|--|--|--|--|------------------------------------|--|
| <input type="checkbox"/> 3mc | <input type="checkbox"/> Brightstar | <input type="checkbox"/> Brilliant Solutions | <input type="checkbox"/> Dynamo for Intermediaries | <input type="checkbox"/> Finova | <input type="checkbox"/> Legal and General |
| <input type="checkbox"/> Lending Score | <input type="checkbox"/> Next Intelligence | <input type="checkbox"/> Paradigm | <input type="checkbox"/> PMS | <input type="checkbox"/> SimplyBiz | <input type="checkbox"/> TMA |

PLEASE NOTE: failing to notify us which club you are submitting via will prevent your request from proceeding.

If you would like to receive your Mortgage Choices Offer and Acceptance of Offer Form via secure email and sign these digitally; please ensure unique email addresses and mobile number are provided for each borrower below.

If you do not provide a unique email address and mobile number for each borrower then the Mortgage Choices Offer and Acceptance of Offer Form will be sent in the post with the broker receiving this by email.

Occasionally, DocuSign email notifications may be blocked by either your email server, firewall, email provider, or email client (such as MS Outlook). Kindly check the spam or junk folder within your mailbox to retrieve the DocuSign envelope or contact us for any further support.

1st BORROWER

Name	<input type="text"/>	Mobile +44	<input type="text"/>
Email address	<input type="text"/>		
Date	<input type="text"/>	Correspondence address	<input type="text"/>
Signature	<input type="text"/>		

2nd BORROWER

Name	<input type="text"/>	Mobile +44	<input type="text"/>
Email address	<input type="text"/>		
Date	<input type="text"/>	Correspondence address	<input type="text"/>
Signature	<input type="text"/>		

3rd BORROWER

Name	<input type="text"/>	Mobile +44	<input type="text"/>
Email address	<input type="text"/>		
Date	<input type="text"/>	Correspondence address	<input type="text"/>
Signature	<input type="text"/>		

4th BORROWER

Name	<input type="text"/>	Mobile +44	<input type="text"/>
Email address	<input type="text"/>		
Date	<input type="text"/>	Correspondence address	<input type="text"/>
Signature	<input type="text"/>		

WHAT HAPPENS NEXT?

If you have any queries regarding Mortgage Choices please visit <https://www.kentrelianceforintermediaries.co.uk> for further details.

Return the Broker Authorisation Form by scanning and emailing it to brokertransfers@osb.co.uk. Please retain the original for your records.



For customer service and training purposes, calls with Kent Reliance for Intermediaries may be monitored and/or recorded.

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