

Tell us about your customer's support needs

Please ensure before completing this form you have the customer's consent to record and share their support needs with us. You also need to ensure they understand how we will use their information. Visit nationwide-intermediary.co.uk/cookies-privacy and ask them to read 'How does Nationwide use your information?'

This information will only be used to support the servicing and communication of customers accounts. We will endeavour to meet their needs.

We will not share these support needs with Solicitors or Valuers.

Once completed please send the form to vulnerable.customers@nationwide.co.uk

Please complete the relevant information:

Broker name and FCA reference number:

Customer who has support needs:

Mortgage account number/ application reference:

Does the customer have other products with Nationwide or The Mortgage Works? Yes No

If yes, please specify the products here:

What support does your customer need (tick all relevant):

Meeting me in person

- Please arrange a BSL interpreter for appointments
- Please arrange a manual deaf blind interpreter for appointments
- (A BSL Interpreter and a manual deaf blind interpreter cannot be supplied at the same time)
- Please turn the radio off
- I need to use a hearing loop
- I need to use the aids/tools held in branch
- I lipread, face me when speaking
- I prefer to meet in a quiet space if available
- I prefer to meet in a public space if available
- I use an assistance dog
- Please do not draw attention to my body movements
- Arrange meetings in accessible areas due to mobility issues

Interacting with me

- Speak slowly and clearly pausing between sentences
- Help me with understanding of numbers and information
- I need longer appointments
- Give me more time to respond or complete tasks
- Keep calls and appointments to a minimum
- Please only contact me AM PM
- Check purpose of transactions to support my decision making
- Ask me to summarise information to check my understanding
- Be aware I find social interactions difficult
- Help me with my memory, I may forget information
- I may use an interpreter: BSL/Foreign language
- Someone may assist me to provide support
- When talking to me please speak louder
- My voice may sound different to what you expect
- My speech may be affected so give me time to answer
- Sometimes my behaviour or mood can change quickly

- I struggle with literacy
- Allow me extra reading time
- Check I've understood
- Please read aloud to me

Writing to me

- I can only communicate in writing
- Send me communications in Audio
- Send me communications in Braille
- Send me communications in Large Print
- 16pt (standard large print)
- 20pt
- 26pt
- 30pt
- 36pt
- Send me communications in bold print

How I need to communicate

- Please follow up in writing
- I need to use Video Relay Service to communicate
- I need to use Text Relay to communicate
- I use text-to-speech software to communicate
- Branch is my only accessible channel
- Telephone is my only accessible channel
- Online is my only accessible channel
- I cannot attend meetings in person
- I can't use digital channels

Broker confirmation

Please confirm your customer is aware that:

- We will store these preferences on their records.
- This information will be available to Nationwide Group colleagues
- We will use this information to support them when managing their accounts
- We will use this information when they communicate with us
- They can contact us at any time if they need to make any changes

I confirm I have the customer's permission to share the information in this form with the Nationwide Group and The Mortgage Works.

Date: