Manual Mortgage Illustration Porting Request Form

Any queries regarding this form please call **03457 30 20 11**

Exceptions

Most porting Mortgage Illustrations can be produced via NFI Online, but porting in the following circumstances will require a manual Mortgage Illustration.

(Please tick one of the below)

- ☐ Porting a 25 year fixed rate.
- ☐ Porting if the existing mortgage term takes the applicant past 75 years old.
- ☐ Porting of 4 accounts or more.
- ☐ Porting an account where the current mortgaged property is being let out.

To request a Mortgage Illustration for one of the above scenarios, please complete this form and return via email to **manual.mis@nationwide.co.uk**

Mortgage Illustrations will be e-mailed to the details provided on this form within 48 hours of receipt if received by 3pm. Forms received after 3pm will be treated as having been received by 8am the next working day.

Use of my Information

By submitting this form I/we agree that Nationwide may provide the intermediary with information on my/our mortgage account. To find out more about how Nationwide uses your information visit **nationwide.co.uk/privacy**

Intermediary Declaration

Information about an applicant's existing Mortgage account is confidential. In order for us to comply with the Data Protection Act, we will take your submission of this form as your confirmation that you have the consent of the applicant(s) to release this information to you.

Intermediary Signature: ____ Date: ____________________________

Mortgage Illustration Application Details

Total Mortgage Required	Purchase Price	LTV%
£	£	

Customer Details

Applicant	Full Customer Name (including title)	Date of Birth DD/MM/YY	Post Code
1			
2			
3			
4			

Level of Advice

Advised: ☐

New Property in:

England & Wales ☐	Scotland ☐	Northern Ireland ☐

Additional Comments

Existing Mortgage(s) to be Ported

All existing borrowing (i.e. the amount being ported) will be kept on the existing repayment type. If any part of your existing borrowing is on interest only you must have an acceptable repayment strategy in place. If you wish to transfer some or all of it onto a capital and interest repayment basis when taking out the new loan please confirm this in the table below.

Account Number	Loan Amount to be ported	Term Required YY/MM		Repayment Split	
				Repayment Amount	Interest Only Amount
	£			£	£
	£			£	£
	£			£	£
	£			£	£
	£			£	£
	£			£	£

Additional Borrowing

All additional borrowing must be taken on a capital and interest repayment basis.

Product Code*	Product Description	Initial Rate	Additional Loan Amount	Term Required YY/MM	

*Current Homebuyer existing borrower Product Codes are available on our Product Finder:
nationwide-intermediary.co.uk/products/product_finder

Fees Payable to Nationwide

Product Fee	£	Add to Loan	Yes ☐ No ☐
Booking Fee	£		
Valuation Fee	£		

Are you charging the applicants any additional fees? (if yes, please complete below) Yes ☐ No ☐

Additional Fees

	Valuation	Arrangement	Administration	Advice
Amount	£	£	£	£
Payable When (please choose one option per fee)				
Immediately	☐	☐	☐	☐
On application	☐	☐	☐	☐
Before the mortgage starts	☐	☐	☐	☐
On completion of the mortgage	☐	☐	☐	☐
On redemption of the mortgage	☐	☐	☐	☐

Fees payable to ....

Refunds (please choose one option per fee)				
Is the fee refundable	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐	Yes ☐ No ☐
Amount of refund	£	£	£	£
Refundable When (please choose one option per fee)				
When the offer is issued	☐	☐	☐	☐
When the loan starts	☐	☐	☐	☐
If application does not proceed	☐	☐	☐	☐
Following completion	☐	☐	☐	☐
On redemption of mortgage	☐	☐	☐	☐

Intermediary Details

Intermediary Name	
Individual FCA Number	
Intermediary Company Name	
Contact Telephone Number	
Email Address	
Intermediary Company Address	
Payment Club/Network/Channel Name	

Please ensure you enter your details exactly as they appear on our systems. Should you wish to change your current details please visit our website **nationwide-intermediary.co.uk**