

Material Change Form – Header Sheet

Name of Applicant(s)	
Reference Number	

PLEASE NOTE

This header sheet must be completed in addition to any associated supplementary sheets. You only need to complete the relevant questions that have changed since the original application; by making a change we may need to complete a new credit check which could impact the affordability and decision NFI Online users can scan and attach the completed form to their case or email to mortgagedocuments@nationwide.co.uk. To assist our team in processing the change, please allow us 24 hours before chasing.

Intermediary details

Name	
Address	
Telephone Number	
FCA Number	
Level of Advice (please confirm)	☐ Advised

If your contact details for this case have changed please confirm

New Intermediary Contact Telephone Number	
New Intermediary Contact E-Mail Address	
Are you charging the applicant/s any other fees excluding Nationwide fees/charges or those previously mentioned on the original application?	☐ Yes ☐ No
If yes, please state the amount, to whom it is payable and when payable. If the fee is refundable please state how much is refundable and when.	

Amendments required (tick all appropriate and attach any associated pages)

Change to Intermediary Details	☐
Change to Financial Details	☐ (please complete section 1)
Change to Property Details	☐ (please complete section 2)
Change to Application Details	☐ (please complete section 3)
Change to Direct Debit Details	☐ (please complete section 4)
Do you want to cancel the case?	☐

Please provide a reason for cancellation	
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NB: This form must be signed by the adviser and arranger who signed the declaration on the initial Mortgage Application form.

I confirm that all relevant statutory provisions including requirements under the Financial Services & Markets Act have been satisfied. I confirm that any third party who may have arranged and advised on or introduced this mortgage is authorised to advise and arrange or introduce the business or is exempt from authorisation. I am fully aware that quality checks will be carried out on the validity of the information contained in this application form. I am also aware that product(s) applied for will only be reserved if the correct fee accompanies the application form and the product(s) is/are available on the day the application is received by Nationwide. I also authorise Nationwide to release my details to the third party appointed to carry out the legal work on the remortgage so that they can contact me regarding the case (where applicable). I confirm that all documents provided, whether electronically attached or posted, are genuine copies of the original documents that have been seen by me.

Signature	
Date	

Section 1 - Change to Financial Details

Name of Applicant(s)	
Reference Number	

Please note that you only need to update the relevant questions that need to be changed

New loan details	
Repayment	☐
Interest Only - Please check criteria and requirements	☐
Part and Part - If Part and Part please state split. Please check criteria and requirements for Interest Only	☐ Repayment £ Interest Only £
New Advance required	£
New Purchase Price	£
New Term* If Interest Only or Part and Part please check criteria and requirements	
Reason for additional funds	

If this change impacts the LTV please ensure that you have checked that the current product is still eligible.

New Product Description	
New Product Code	

If you are amending the product or have a multi part loan please complete the following table.

Loan Part	1	2	3	4
Product Code				
Product Description				
Loan Amount				
Porting account number (if applicable)				

* Please ensure you complete the anticipated retirement income (below) where the change to term takes the applicant into retirement.

Anticipated retirement income		
	Nationwide will use the earlier of your declared retirement age or state pension age to determine whether you will be borrowing into retirement. If you are within 10 years of either of these dates and will be borrowing into retirement please complete the following anticipated income details.	
	First Applicant	Second Applicant
Annual investment income (including dividends)	£ per annum	£ per annum
Annual maintenance income	£ per annum	£ per annum
Annual rental from a mortgage free property	£ per annum	£ per annum
Annual pension income (including annuities)	£ per annum	£ per annum
Annual child benefit	£ per annum	£ per annum
Annual state disability benefit	£ per annum	£ per annum
Annual universal credit/tax credit	£ per annum	£ per annum

Section 2 - Change to Property Details

Name of Applicant(s)	
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Please note that you only need to update the relevant questions that need to be changed

Property Details and Features

Please note: This form can only be used where the property ownership type remains the same as the original application. For example it can't be used if changing from Standard to Shared Ownership Please see Submit a case | Nationwide For Intermediaries for details.

House	☐
Bungalow	☐
Flat	☐
Maisonette	☐
Detached	☐
Semi Detached	☐
Terraced	☐
Studio	☐
Purpose Built Flat/Maisonette	☐
Converted Flat/Maisonette	☐

Purchase Price	£
Estimated Value	£
If the purchase includes any gifted deposits or incentives from the vendor/builder, please provide details	
Is the property being sold purposely and knowingly at below the open market value?	☐ Yes ☐ No
What is your relationship to the Seller	

Tenure

Freehold	☐
Leasehold	☐
Commonhold	☐
Ownership Scotland	☐
If Leasehold, Unexpired Lease term (years)	No Relationship ☐ Family member ☐ Partner ☐ Friend ☐ Business Associate ☐ Work Colleague ☐ Employer ☐ Landlord ☐
Property Region	
What year was the property built?	
Number of bedrooms?	
How many floors does the property have?	
Is the property a new build or newly converted or refurbished?	☐ Yes ☐ No
Are you purchasing the freehold of block?	☐ Yes ☐ No
Does the property have a basement or cellar?	☐ Yes ☐ No
Is the property under construction or major redevelopment (or due to be)?	☐ Yes ☐ No

Is the property habitable?	☐ Yes ☐ No
Is the plot size greater than 1 acre?	☐ Yes ☐ No
Has the property been flooded in the last 5 years?	☐ Yes ☐ No
Has the property suffered from subsidence, heave or landslip?	☐ Yes ☐ No

If the property is shared ownership

% of shared ownership	
Rent payable	

If the property is equity share

% retained by equity holder	
Name of equity holder	

If the property is a flat

Number of floors in the block	
Floor number of flat	
Is it serviced by a lift?	☐ Yes ☐ No

New estate agent/vendor details

Name of Estate Agent/Vendor	
Contact Name	
Company Address	
Telephone Number	
E-mail address	

Valuation Requirements:

The Society is legally obliged to assess the value of the property for mortgage purposes and may obtain a valuation report. However, this report will not be adequate for the purposes of someone wishing to purchase and live in the property. The report may not reveal serious defects and there may be important inaccuracies or omissions. It will not be a Structural or Building Survey Report and will be based upon a limited inspection. You are therefore strongly advised to obtain your own report on the condition and value of the property, based on a fuller inspection.

Valuation required

Mortgage Valuation Report	☐
Home Survey Level 2 Report	☐
Transcription (Scottish purchases only)	☐

If this is an exception case please ensure you have attached the appropriate fee.

Section 3 - Change to Application Details

Name of Applicant(s)	
Reference Number	

Please note that you only need to update the relevant questions that need to be changed

Applicant 1	
Current Name	
New Name	
Reason for change	

Please attach the relevant proof for change of name.
Marriage Certificate - Written confirmation of Divorce (from the applicant or solicitor) - Deed Poll

Applicant 2	
Current Name	
New Name	
Reason for change	

Please attach the relevant proof for change of name.
Marriage Certificate - Written confirmation of Divorce (from the applicant or solicitor) - Deed Poll

New solicitor details	
New Solicitor Company Name	
New Solicitor Name	
Address	
Telephone Number	
Reason for change	

NBS will require written confirmation from the old solicitor to state they are no longer dealing with this case, and written confirmation from the new solicitor to confirm they are acting on behalf of the applicants for this case.

Any other details	
Please provide full details of any other changes	

Section 4 - Change to Direct Debit

Name of Applicant(s)	
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Please note that you only need to update the relevant questions that need to be changed

New direct debit details	
Bank Name	
New Bank Account Number	
New Bank Sort Code	
Bank account holder Name(s)	
Preferred payment date (valid values 1-28)	