



Our Promise To You

This document establishes the fees and our terms and conditions that are relevant to the work we will do for you. Specifically, it confirms:

- How we manage your personal data in accordance with the Client Privacy Notice.
- The documents we have provided to you.
- How and when we will be paid if we arrange a product for you.
- How and when we will engage with you in the future.

Please take time to read through these terms fully and take the opportunity to ask questions to confirm your understanding.

If you disagree with anything that has been recorded by your adviser in this document, please let them know as soon as possible.

1 Your Personal Data

By signing this declaration, you agree that

- Your consent has been given for this appointment and any future meetings.
- The personal data we hold about you may be processed by us, and where necessary shared with third parties, such as product providers and Housing Associations (if applicable), for the purpose of processing your application, assessing the risk to grant credit and for regulatory purposes.
- You have been provided with a copy of our Client Privacy Notice and Terms of Business.
- You give authority for Mortgage Advice Bureau to act on my / our behalf.

2 Agreement to ongoing service and Re-engagement

It is important that we keep in touch to review your future mortgage and insurance needs, in particular when your mortgage product is nearing expiry.

It will be an important opportunity to check that you are not paying more than you need to and that your existing arrangements continue to meet your needs.

We will automatically contact you to review your circumstances unless you tell us not to.

You may withdraw from these arrangements at any time by contacting us by telephone, e-mail or in writing. Alternatively, any email communications will include a link to unsubscribe from future communications.

3 Communication with you

As part of the ongoing service described in section 2, it is important that we only contact you using methods you agree to. Please indicate your preferred method(s) of contact:

Customer 1

☐

Telephone

☐

E-mail

☐

SMS / Text

Customer 2

☐

Telephone

☐

E-mail

☐

SMS / Text

4

Marketing preferences

We would like to send you product updates, special offers, news and details of relevant events from Mortgage Advice Bureau and its partners via email, telephone and SMS.

Please indicate below if you would like to receive these and tick your preferred methods of contact:

Customer 1

☐

Yes please, I would like to receive the following

☐

Telephone

☐

E-mail

☐

SMS / Text

Customer 2

☐

Yes please, I would like to receive the following

☐

Telephone

☐

E-mail

☐

SMS / Text

5

Fees and Costs

Brief outline of service provided

We will be providing you with advice and a recommendation in respect of your mortgage and / or protection needs.

Fees for arranging a mortgage

Payable on application of the mortgage.

Payable on receipt of the mortgage offer.

Payable on completion of the mortgage.

Payable if you change to a different product after application.

☐

No Fee

We do not charge a fee for providing protection advice

I agree to schedule the payment described above and will make payment when requested, in accordance with the terms of my agreement with you.

☐

I agree

☐

No Fee

X

Signature (Customer 1)

X

Signature (Customer 2)