



**Mortgage
Advice Bureau**

OUR PROMISE TO YOU

This document establishes the fees and our terms & 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 during our initial and subsequent contact with you
- How and when we will be paid if we arrange a mortgage for you
- How and when you would want future contact from us to provide ongoing service

Please take time to read through these terms fully and take the opportunity of asking any questions to confirm your understanding, before signing this form.

1 Your Personal Data

By signing this declaration, you agree that:

- Your consent has been given for this appointment and any future meetings
- Personal data we hold about you may be processed by Mortgage Advice Bureau, 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.

2 Guides to Help you

NB: You will only be provided with the Information Guide(s) that may be relevant to you.

Name of document	Date / Method Provided
Client Privacy Notice	
Terms of Business	
Other Documents	

3 Communication with you

It is important for us to be able to contact you throughout your application. Please indicate your preferred method(s) of contact:

Customer 1

- | | |
|---------------------------------------|---|
| <input type="checkbox"/> Telephone | <input type="checkbox"/> E-mail |
| <input type="checkbox"/> Face to Face | <input type="checkbox"/> Third Party Intermediaries |
| <input type="checkbox"/> SMS / Text | <input type="checkbox"/> Other |

Customer 2

- | | |
|---------------------------------------|---|
| <input type="checkbox"/> Telephone | <input type="checkbox"/> E-mail |
| <input type="checkbox"/> Face to Face | <input type="checkbox"/> Third Party Intermediaries |
| <input type="checkbox"/> SMS / Text | <input type="checkbox"/> Other |



4 Marketing preferences

We believe it is important to provide you with an ongoing service. Part of the service we offer is to send information that may be of interest to you. If you would like to take advantage of this aspect of our service please confirm, by ticking the following type(s) of contact acceptable to you:

Customer 1

- | | |
|--|---|
| <input type="checkbox"/> Opt in | <input type="checkbox"/> Automated call |
| <input type="checkbox"/> Post | <input type="checkbox"/> Third Party Intermediaries |
| <input type="checkbox"/> SMS / Text | <input type="checkbox"/> By phone |
| <input type="checkbox"/> Website enquiry | <input type="checkbox"/> Face to face |
| <input type="checkbox"/> E-mail | <input type="checkbox"/> Other |

Customer 2

- | | |
|--|---|
| <input type="checkbox"/> Opt in | <input type="checkbox"/> Automated call |
| <input type="checkbox"/> Post | <input type="checkbox"/> Third Party Intermediaries |
| <input type="checkbox"/> SMS / Text | <input type="checkbox"/> By phone |
| <input type="checkbox"/> Website enquiry | <input type="checkbox"/> Face to face |
| <input type="checkbox"/> E-mail | <input type="checkbox"/> Other |

5 Agreement to ongoing service and Re-engagement

We would also like to keep in touch to review your mortgage, insurance needs and current arrangements, in particular when your mortgage product is nearing expiry. This is important as, for example, it will be an opportunity to check that you are not paying more than you need to and whether your existing arrangements are still appropriate as your circumstances and needs change.

You may withdraw from these arrangements at any time by contacting us by the following e-mail or in writing at the address shown overleaf.

E-mail	
Address	

- ☐ I / We confirm that I / we have received a copy of the Terms of Business document, the Client Privacy Notice, any relevant guides, and agree to the terms therein
- ☐ I / We give you authority to act on my/our behalf as per the terms & conditions defined

Customer 1 name	
Signature	
Date	

Customer 2 name	
Signature	
Date	

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Fees and Costs explained

Brief outline of service provided	
Method of payment for arranging this mortgage	<input type="checkbox"/> Commission from lender <input type="checkbox"/> Fee paid by you <input type="checkbox"/> Both commission from lender and fee paid by you
Fee paid by you for arranging this mortgage	<p>£ paid on application of the mortgage</p> <p>£ paid on receipt of the mortgage offer</p> <p>£ paid on completion of the mortgage (i.e. when the funds are drawn down)</p> <p><input type="checkbox"/> No Fee</p>
Agreement for card payment instalments to be taken	<p>I authorise _____ to send instructions to the financial institution that issued my card to take payments from my card account, in accordance with the terms of my agreement with you.</p> <p><input type="checkbox"/> I agree <input type="checkbox"/> N/A</p>
Fee paid by you for any Protection Advice	No fee is charged to you

☐

I / We confirm we have understood the remuneration outlined and agree to any fee specified above as being payable by me / us

Customer 1 name	
Signature	
Date	

Customer 2 name	
Signature	
Date	