

Service Level Agreement for (mortgage Intermediaries)

Date of agreement 20 May 2023



Objective of the agreement

The purpose of this Service Level Agreement is to describe the key services we provide and the quality standards we have agreed with our service users in terms of service delivery.

This agreement sets out

- The services we provide to Intermediaries
- The overall standard which we aim to achieve in the provision of our services
- A mechanism for resolving any problems relating to the delivery of the service

Future reviews and amendments to this Service Level Agreement

This agreement will be reviewed annually as part of the annual planning process and any changes will be agreed with service users. Changes made to this agreement will be signed off by all parties annually.

Objectives of the service

- To provide lending decisions on enquiries from mortgage Intermediaries
- Carry out broker registrations
- Carry out ESIS requests as needed

Service users

- Mortgage Intermediaries

Service availability

Our Intermediary Helpdesk is open Monday-Friday 9am-5pm.

Service availability

- AIP's – Acknowledgment within 4 hours and decisions are given within 24 hours for more complex cases
- ESIS requests – Usually within 4 hours but can take up to 24 hours
- Broker registrations – up to 24 hours
- Acknowledgement of new applications - 24 hours
- Initial assessment and requests for further information - 48 hours
- Assessment of references, valuations and additional information - 48 hours

All timescales are working hours. If you need any of the above dealing with more urgently we will endeavor to meet your request, please advise us in your email or by telephone.

Complaints

We have a formal complaints procedure, which is available on our website www.newbury.co.uk, or from any of our branches or head office. If you have a complaint, please contact the Intermediary Helpdesk so they can resolve it. You can request that your complaint be referred to head office. It is our intention to settle all complaints promptly and fairly. We are participants of the Financial Ombudsman Service. Most complaints that we cannot resolve can be referred to the Financial Ombudsman Service www.financial-ombudsman.org.uk.

Responsibilities – who we are, what we do

Sales manager

Overall responsibility for introduced sales.



Karen Smith
Email – Karen.smith@newbury.co.uk
Tel – 07900 058 582



Alice Pocock
Email – Alice.pocock@newbury.co.uk

Intermediary sales manager

Responsible for the day to day running of the Intermediary Helpdesk.



Emma Evans
Email – Emma.evans@newbury.co.uk
Tel – 07468 695 075

Intermediary sales advisers

Responsible for manning the Intermediary helpdesk, dealing with incoming enquiries and broker registrations.



Amelia Corney
Email – Amelia.corney@newbury.co.uk

Senior business development managers

Responsible for Business development and overseeing the Top 10 mortgage Intermediaries.



Martin Yates
Email – Martin.yates@newbury.co.uk
Tel – 07900 058 594



Matt Harris
Email – Matt.harris@newbury.co.uk



Matthew Long
Email - Matthew.long@newbury.co.uk
Tel - 07468 695 074



Will Humphries
Email - Will.humphries@newbury.co.uk

Business development managers

Responsible for introduced business from their allocated areas.



Jack Whiting
Email – Jack.whiting@newbury.co.uk
Tel – 07900 058587



Will Simpson
Email - Will.simpson@newbury.co.uk