

Intermediary ESIS request



Newbury
Building Society

Details of the Mortgage Intermediary giving advice to this customer on this mortgage application:

Level of service given Advised Execution only

Name of adviser _____ Email _____

Telephone _____ Mobile _____

Company name and address _____

Are you: Directly Authorised Financial Services Register number _____

Appointed Representative Principal Firm name and address _____

Financial Services Register number _____

If you use a 'trading as' name please give details: _____

Do you wish to use a mortgage club, if so please confirm which one: _____

Is there a fee payable by the customer to you? Yes No

If YES, please give amount £ _____ When is the fee payable? _____

Is any of the fee refundable? Yes No If YES, when and how much? _____

Applicant details

Applicant 1

Applicant 2

Title _____

First name(s) _____

Surname _____

Mortgage details

Remortgage Purchase Product transfer
Existing account number _____

Value/purchase price £ _____

Address of property to be mortgaged _____

Loan details (please detail separately if split repayment) _____

Amount	Repayment method	Term in years	Product

Is a homebuyers report required? Yes No Is the application fee to be added to the loan? (If applicable) Yes No

Will the advance be in stages? Yes No If Yes, how many stages in total (including initial stage)? _____

We comply with the General Data Protection Regulation (GDPR) and any other applicable data protection legislation. Our Privacy Notice sets out the basis on which any personal data we collect from you, or that you provide to us, will be treated.

By completing this form, you are agreeing to our Privacy Notice and confirm you have advised your client of it's availability as below. The notice may be updated from time to time. The latest version is available via our website at www.newbury.co.uk/privacy-notice/, in any of our branches or by calling us on 01635 555700.

Newbury Building Society is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register number 206077). English Law applies and we will communicate with you in English. We are participants of the Financial Ombudsman Service. We have a complaints procedure which we will provide on request. Most complaints that we cannot resolve can be referred to the Financial Ombudsman Service. 7454