

# Change of Adviser form

This document is to be used when an adviser takes over responsibility for an existing application on behalf of a colleague.

A copy of this form will be retained for our records.

We require the new adviser to **agree to the Document Upload terms and conditions** and **Broker Declaration requirements** before gaining access to case information and uploading new documentation.

## By signing this document you are agreeing to the following terms:

### Document Upload terms and conditions

- By accepting these terms and conditions you confirm that any document you upload has been seen by you as the adviser responsible for this mortgage application.
- When using the document upload facility you confirm that the documents are a copy of the original or that you are certain of their authenticity and that they have not been subject to unauthorised or accidental alteration.
- There is no need to stamp them or sign 'originals seen' before uploading them (however you will still need to do this if you send the documents via post/fax/email).

### Broker Declaration

- I confirm that all the relevant statutory provisions, including requirements under Financial Services & Markets Act, have been satisfied.
- I confirm that I am aware of any known or foreseeable changes to my client's income/expenditure and that I have taken this into account when checking the affordability of this mortgage.
- I confirm where debt consolidation is the main purpose of the mortgage, that I have taken into consideration the costs associated with increasing the term, securing a previously unsecured loan and, if payment difficulties exist, whether it would be more appropriate to negotiate an arrangement with existing creditors rather than take out this mortgage.
- I am fully aware that quality checks will be carried out on the validity of the information contained in the online application submitted.
- I confirm that this application and any supporting information is submitted in accordance with the NBS Terms of Business for Mortgage Brokers

Application number: \_\_\_\_\_

Name of applicants: \_\_\_\_\_

Name of new adviser: \_\_\_\_\_

Company name: \_\_\_\_\_

FCA number: \_\_\_\_\_

Signature of adviser: \_\_\_\_\_

Date: \_\_\_\_\_



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**YOUR PROPERTY MAY BE REPOSSESSED IF YOU DO NOT KEEP UP REPAYMENTS ON YOUR MORTGAGE**