

## **Intermediated Product Transfer – Third-Party Authority Form**

### **What is Intermediated Product Transfer – Third-Party Authority?**

This document allows the named person who is not an account holder on your mortgage permission to discuss your Mortgage Product Transfer and receive correspondence in relation to this.

### **How can you grant an Intermediated Product Transfer Third-Party Authority?**

You can grant the authority to a named individual by completing the form. The Third-Party Authority Form must be fully signed and dated by all borrowers on the mortgage.

### **Who can hold Third-Party Authority?**

This form is only suitable for Mortgage Brokers, Intermediaries or Financial Advisers.

### **How long does a Third-Party Authority last?**

Once submitted a Third-Party Authority Form remains valid for 12 months from the date on the form.

The Third-Party Authority can be withdrawn by contacting Hinckley & Rugby Building Society in writing or by email from an email address we have registered for a borrower on the account.

The Third-Party Authority Holder can also relinquish their authority at any time by contacting Hinckley & Rugby Building Society in writing or by email from the email address provided for them on the Third-Party Authority Form.

## Section 1: Account Details – to be completed by the Account Holder(s)

<b>Mortgage Account Number</b>	01
<b>Account Holder Name</b>	
<b>Account Holder Telephone Number &amp; Email Address*</b>	
<b>Account Holder Name</b>	
<b>Account Holder Telephone Number &amp; Email Address*</b>	
<b>Account Holder Name</b>	
<b>Account Holder Telephone Number &amp; Email Address*</b>	
<b>Account Holder Name</b>	
<b>Account Holder Telephone Number &amp; Email Address*</b>	

\* We require this information to ensure our records are up to date

## Section 2: Confirmation of Third-Party Authority – to be completed by the Account Holders

### Instructions:

**This section must be fully completed, before being signed and dated by all account holders.**

#### 1) I / we give my / our authority for the persons named in section 3 below to:

- Discuss information **and** receive copies of all correspondence in relation to our Mortgage Product Transfer sent by Hinckley & Rugby Building Society in relation to the mortgage account identified above for a period of 12 months commencing from the date on this form.

To protect the security of your account, before discussing it with your Third-Party Authority Holder we will always ask them to complete our call security procedure. We will ask them to:

- Confirm the Mortgage Account Number they wish to discuss.

- Confirm their password (this password must be agreed with the Third-Party Authority Holder and must not be shared with anyone other than the Third-Party Authority Holder and the Account Holders). **This password must not be the same as that used by any account holder.**
- Correctly answer one or more additional questions based on the information provided in the “Third-Party Authority Details Table” below, and/or to provide the full names of all borrowers on the account.

**2) Please enter the Third-Party Authority Password you have agreed with the Third-Party Authority Holder here:**

The Third-Party Authority Holder Password is: \_\_\_\_\_

**3) Please complete the Third-Party Authority Details Table below**

**It is important that this information is complete and accurate as it will be used to verify the identity of your Third-Party Authority Holder before discussing your account.**

<b>Third-Party Authority Holder Details</b>	
<b>Full Name:</b>	
<b>DOB:</b>	
<b>Role:</b>	
<b>Full Name of 2<sup>nd</sup> Third-Party if applicable:</b>	
<b>DOB:</b>	
<b>Role:</b>	
<b>Organisation Name:</b>	
<b>Address (including Post Code):</b>	
<b>Telephone Numbers:</b>	
<b>Email address:</b>	

<b>Email address to which correspondence is to be sent if different to the above:</b>	
<b>FCA Number:</b>	
<b>Network / Club:</b>	

**4) Please read the following statements before signing below**

**I/we understand:**

- Unless withdrawn by me/us or cancelled by the Third-Party Authority Holder, this Authority will remain valid for a period of 12 months from the date shown below.
- I/we understand that we can withdraw this Authority at any time by contacting Hinckley & Rugby Building Society in writing or by email from an email address held on the account.
- The Third-Party Authority Holder can relinquish their Authority by contacting Hinckley & Rugby Building Society in writing or by email from the email address supplied above.
- Registration of this Authority is subject to the Third-Party confirming their agreement to holding this Authority by completing and signing Section 3 of this form.

**I/we confirm:**

- That the person identified in Section 3 has agreed to become a Third-Party Authority Holder on this account.
- That we have provided the Third-Party Authority Holder with the relevant information which they may need to provide to satisfy the Society's security procedure.
- I/we have read and understood the details of how the information provided on this form will be used and stored (see "Use of Your Information" below).

**Account Holder 1:**

**Name:** \_\_\_\_\_ **Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Account Holder 2:**

**Name:** \_\_\_\_\_ **Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Account Holder 3:**

**Name:** \_\_\_\_\_ **Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Account Holder 4:**

**Name:** \_\_\_\_\_ **Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_



