

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The Third-Party Authority can be withdrawn by contacting Hinckley & Rugby Building Society in writing or by email from an email address we have registered for a borrower on the account.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

Mortgage Account Number	01
Account Holder Name	
Account Holder Telephone Number & Email Address*	
Account Holder Name	
Account Holder Telephone Number & Email Address*	
Account Holder Name	
Account Holder Telephone Number & Email Address*	
Account Holder Name	
Account Holder Telephone Number & Email Address*	

^{*} 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 Auth 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.

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

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

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:			

Section 3: Acceptance of Third-Party Authority – to be completed by the Third-Party Holder

I confirm that:

- I agree to hold Third-Party Authority in relation to the Mortgage Product Transfer on this account.
- I understand I am not authorised to make decisions/changes or to take any action on this account unrelated to the Mortgage Product Transfer.
- I understand that when communicating with Hinckley and Rugby by telephone I will be required to satisfy Hinckley & Rugby's security process which will include providing:
 - o the password recorded in Section 2.

Third-Party Authority Holder:

- o personal information as recorded in Section 3 of this Third-Party Authority form.
- o the account number and full names of all account holders on the account.
- I understand I can discontinue this Third-Party Authority at any time by contacting Hinckley & Rugby Building Society in writing, or by email from the email address specified above.
- I understand how Hinckley & Rugby will use my personal information (for information please see the "Use of Your Information" section of this form.

Name:	·	·	Signature:	Date:
Name:			Signature:	Date:

Use of your information

An explanation of how we use your information can be found online at https://www.hrbs.co.uk/privacy/

If you are unable to access this information, it can be requested by contacting our Contract Variations team on 01455 894739 or emailing contractvariations@hrbs.co.uk