

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The Third-Party Authority can be withdrawn by contacting Hinckley & Rugby Building Society in writing or by email from an email address we have registered for a borrower on the account.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

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# 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.

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* 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.

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

The Third-Party Authority Holder Password is:

1. **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 2nd Third-Party if applicable:**  |   |
| **DOB:**  |   |
| **Role:**  |   |
| **Organisation Name:**  |   |
| **FCA Registered Address (including Post Code):**  |   |
| **Telephone Numbers:**  |   |
| **Email address:**  |   |

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|  |  |
| --- | --- |
| **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.

|  |  |  |
| --- | --- | --- |
| **Account Holder 1:** **Name:**  | **Signature:**  |  **Date:**  |

* 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 2:** **Name:**  | **Signature:**  |  **Date:**  |

 **Account Holder 3:**

 **Name: Signature: Date:**

 **Account Holder 4:**

 **Name: Signature: Date:**

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# 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:
	+ the password recorded in Section 2. o personal information as recorded in Section 3 of this Third-Party Authority form.
	+ 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.

**Third-Party Authority Holder:**

 **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/**](https://www.hrbs.co.uk/privacy/)

**If you are unable to access this information, it can be requested by contacting our Product Maturities team on 01455 894739 or emailing** **productmaturities@hrbs.co.uk**.

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