## How to submit product transfers

## Login to our online application system If your customer's mortgage originated through Post Office you must be registered and able to submit business with Post Office for Intermediaries to access their account. You'll need ALL of the following: - 10 digit mortgage account number (found on your customer's 'Start application' > annual mortgage statement. Not the same as the case ID) postcode of mortgaged property 'Search for account' > - first name, surname and date of birth (for the same customer) Enter customer details - number of people named on the mortgage - last contractual monthly payment (must be correct to Select all sub accounts to transfer. Choose You can transfer any eligible sub accounts on to the same rate (the length of mortgage term for each sub account the rate, and whether you'd like to reduce the length of the mortgage term can be different) If there's a product fee, select whether it's to be paid upfront or added to the loan (and to which sub account if applicable) Check the new monthly payment and 'Continue with product transfer' to proceed Let us know the level of service provided to your customer and any fees charged If you confirm the product transfer you'll receive a Review the changes. Mortgage Illustration and a Variation of Mortgage Offer that 'Confirm product transfer' to proceed, is guaranteed for 30 days. You also have the ability to request multiple Mortgage or request a Mortgage Illustration to Illustrations, however you'll have to start the transfer discuss further with the customer process again when you're ready to proceed. Choose how you'd like us to send We can send the Variation of Mortgage Offer to your the Variation of Mortgage Offer customers either by post or online. If they choose online, we'll need an individual email address for each customer to your customer Make your customer aware of the declaration. If they're happy, select 'Continue' to We'll upload your copy to the 'Documents' tab submit the transfer request. of the case hub. This will be valid for 30 days The Variation of Mortgage Offer will be sent within 5 working days

To guarantee that your customer's product transfer takes effect from the 1st of the month after their deal finishes (or next month if their deal has ended), we must receive the following by 19th of the previous month or before their Offer expires:

- Offer acceptance
- Any documents we've asked for
- The Product Fee (if applicable)

After this date, the product transfer may not take effect until a month later.

For more information visit www.postoffice4intermediaries.co.uk or call us on 0345 266 8928. Lines are open 8.30am – 6pm Mon to Fri. Calls may be recorded for training and monitoring purposes. Calls cost no more than calls to geographic numbers (01 or 02). Calls from landlines and mobiles are included in free call packages.

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