

How to submit product transfers

Visit your sourcing system to get a Product Transfer Illustration. Once you and your customer are ready to proceed, [log in](#) to apply.

If your customer's mortgage is with Post Office you must be registered and able to submit business with Post Office for Intermediaries.

1

**'Start application'
'Search for account'**

Have the following to hand:

- ▶ Mortgage account number (10 digit number, this can be found on your customers Annual Mortgage Statement)
- ▶ Postcode of mortgaged property
- ▶ First name, surname and date of birth
- ▶ Number of people named on the mortgage
- ▶ Last contractual monthly payment (must be correct to the penny).

2

Select the accounts, **search rates** and choose if you want to **reduce the mortgage term**

You can transfer any eligible sub account on to the same rate - the length of mortgage term for each sub account can be different.

3

If there's a product fee, choose if it will be paid upfront or added to the loan (and to which sub account)

4

Continue with Product Transfer and complete the Level of Service & Fees section

5

Overview section - at this stage you can choose to Confirm Product Transfer or Request a Mortgage Illustration:

Confirm Product Transfer

Complete the Variation of Mortgage Offer section. If choosing to receive documents online, please make sure the email addresses are different for each customer on the account. Select **'Continue'** to confirm Product Transfer request.

Product transfer submitted

You'll receive the Variation of Mortgage Offer and Mortgage Illustration in 5 working days, these are valid for 30 days.

When it's ready we'll upload your copy to the 'Documents' tab in your case hub.

Request Mortgage Illustration

This can take up to 5 working days

Mortgage Illustration Requested

You'll receive the Mortgage Illustration in 5 working days and this is valid for 30 days.

You can request multiple Mortgage Illustrations but you'll need to start the transfer process again. When it's ready we'll upload your copy to the 'Documents' tab in your case hub. Then once you and your customer are happy to proceed, you can 'Confirm Product Transfer'.

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 INTERMEDIARY USE ONLY - NOT FOR PUBLIC DISTRIBUTION

For more information visit www.postoffice4intermediaries.co.uk or call us on 0345 266 8928. Lines are open 9am - 5pm 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.

Post Office Money® Mortgages are provided by Bank of Ireland (UK) plc. Bank of Ireland UK is a trading name of Bank of Ireland (UK) plc which is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Registered in England & Wales. Registered Number: 7022885. Registered Office: Bow Bells House, 1 Bread Street, London, EC4M 9BE. Post Office Money® and the Post Office Money® logo are registered trademarks of Post Office Limited.

1298 3 BIM0415 0222



Money

in conjunction with

Bank of Ireland UK
for Intermediaries