

Right Here for Product Transfers Video Transcript

With our online product transfer service, you can switch your client's existing mortgage with us to a new deal in minutes.

You can access this service within our online application system, up to six months before the end of your client's current deal.

Simply search for your client and select which sub accounts to transfer. This will show the new rates they can transfer to.

If there's a product fee, your client can choose whether to pay this before completion or add it to the loan. And they have the option to reduce the length of the mortgage term at the same time.

Once you've selected your client's choice of rate, simply input some quick details about your level of service and fees.

You'll then see details about your client's new rate and monthly payment.

Once you're happy with everything, you can proceed to confirm the product transfer.

You and your client can choose to view the mortgage offer online or receive it in the post.

We'll also issue a Mortgage Illustration alongside the Variation of Mortgage Offer to save you time. This secures the chosen rate and the offer will be valid for 30 days.

Once you've confirmed the declaration, that's it. The case will sit with your other active cases. An offer will be on its way to you and your client within 5 working days. And don't forget to make sure that all applicants sign and return the offer.