

# 55+ Mortgage & Retirement Mortgage – Moving Home Application Form



Plan Reference

## First Applicant

First Name(s) including title

Marital Status

Date of Birth

## Second Applicant

First Name(s) including title

Marital Status

Date of Birth

## Address of the property you wish to purchase

Property Address

Purchase Price

Equity remaining

Will anyone else occupy the property

 Y  N

If yes, please provide details

## Repayment Vehicle (55+ Mortgage only)

Is your repayment vehicle remaining the same as the original selected?

 Y  N

**Repayment Vehicle:**

Maturity of investments

Maturity of an endowment policy

Downsizing main residence

Sale of additional property

## Changes to the Repayment Vehicle

If your repayment vehicle is changing please advise us as to the change.

Please provide details of any changes

Please be aware that any change may be subject to additional underwriting questions which will increase the processing time of your application.

## About the property you wish to purchase

The property you wish to purchase must be suitable for the plan. Please complete this section as fully as possible, to ensure that any issues that could affect your application are identified early. Once you have submitted this application, we will instruct a surveyor to visit the property to value it.

If you are unsure about the eligibility, please contact us for assistance.

### Tenure

Type  Freehold  Leasehold  
 Commonhold  Absolute

If leasehold:  
Remaining term  years

Annual Service charge  £

How is the title held?  
 In one name  
 As beneficial joint tenants  
 As tenants in common

### Property type

Select property type  House  Bungalow  
 Flat/Maisonette

If House or Bungalow  
 Detached  Semi-detached  
 Terraced/Linked

If flat/maisonette  On what floor is it?  Number of floors in block

Y  N Is there a lift?

### Property Information

No. of Bedrooms

Age of property  years

Date purchased

Purchase price  £

### Construction

External walls  Brick  Stone  Timber frame

Roof  Tile  Slate  Other

If timber frame, is the outer wall brick, block or stone?  Y  N

If flat roof, approx. % of total roof area  %

Other

## About the property you wish to purchase

Will the property be your main residence?  Yes  No

Is the property located in England, Wales or mainland Scotland?  Yes  No

Was the property previously owned by the public sector?  
(i.e. Council, Housing Association or MoD)  Yes  No

Is the property situated over, or in close proximity to, retail or business premises?  Yes  No

Is the property part of a sheltered housing development?  Yes  No

Do any age restrictions apply to the property?  Yes  No

Is the property used for any form of business/commercial activity?  Yes  No

Is the property listed?  Yes  No

If yes, Grade of Listing?  Grade of listing

- Does the property have more than 10 acres of land?  Yes  No
- Are there any agricultural ties or restrictions on the property?  Yes  No
- Has the property ever been flooded or is it at significant risk of flooding?  Yes  No
- Has the property ever been subject to underpinning or major structural repair?  Yes  No
- Have there been any disputes regarding the boundaries, use of the property or any other matter in relation to the property  Yes  No
- Is the property held in trust?  Yes  No
- Is the property in close proximity to high voltage overhead wires, pylons, electric substations or telephone masts?  Yes  No
- Is it a Newly Build Property  Yes  No
- If yes, is the property fully completed and habitable  Yes  No
- If yes, does it have an NHBC or similar warrenty  Yes  No
- If it is a flat, is the while block fully completed including all other flats and communal areas  Yes  No

N.B. If you have ticked any of the shaded boxes, please provide further details to enable our underwriters to assess the eligibility of your property

### Your Solicitor

You must appoint your own solicitor to act for you in the purchase of your new property. They will undertake the conveyancing for you and liaise with our solicitor to arrange for your plan to be transferred to the new property.

Company Name	<input type="text"/>	Name of solicitor acting for you	<input type="text"/>
Property Address	<input type="text"/>	Telephone	<input type="text"/>
		Email	<input type="text"/>
		DX	<input type="text"/>

### Estate Agent Details for the property you wish to purchase

Please provide details of the estate agent who is selling the property you wish to purchase. If there is no estate agent, please provide the vendor details.

Company Name	<input type="text"/>	Name of estate agent	<input type="text"/>
Address	<input type="text"/>	Telephone	<input type="text"/>
		Email	<input type="text"/>

## Client Declaration to Hodge Lifetime

### This application

- I enclose payment in order for a Chartered Surveyor to value the property I wish to move to. I understand that this fee is not refundable even if the property does not meet the eligibility criteria. Payment of this fee does not mean that Hodge Lifetime is obliged to accept my application.
- I understand that the valuation undertaken is a limited inspection for Hodge Lifetime's purposes only and it is possible that it may not reveal important defects in the property. If I wish to satisfy myself as to the condition of the property then I understand that I should obtain a more detailed or structural survey.
- I have a right to withdraw from this moving home application at any time before it is complete. However, if I withdraw, I will not receive a refund of any fees I have paid to Hodge Lifetime, and I may still be required to pay my financial adviser and solicitor, and Hodge Lifetime's solicitor, for the work they have undertaken on my behalf.
- All the details in this application are, to the best of my knowledge and belief, true and complete. If Hodge Lifetime finds any to be untrue, it could affect my eligibility to transfer my existing equity release plan to this property.
- I understand that if I proceed on an execution-only basis:
  - Hodge Lifetime will act solely on my instructions.
  - Hodge Lifetime will not provide me with advice and will not assess the suitability of the transaction for me.
  - I will not benefit from the same protection I would get if I had taken advice.
- The information held about me may be used for the following purposes:
  - Administering my application
  - Assist in fraud prevention
  - Reporting to regulators or authorities
  - Market and product analysis
  - Verifying my age and identity, and anti-money laundering checks.
- A search may be undertaken with a credit reference agency to verify identity. This will mean:
  - The credit reference agency will check the details supplied against any database, public or otherwise
  - A record of the search will be retained
  - The credit reference agency may use the details provided to assist other companies for verification and identification purposes.
- The information held about me may be shared with the following parties:
  - The professional advisers involved in this application, including solicitors, surveyors and my financial adviser (where applicable)
  - Hodge Lifetime's approved service providers in relation to this application
  - Other members of Hodge Lifetime's group, comprising Julian Hodge Bank Limited, its subsidiaries and associated companies
  - Regulators and authorities where required or permitted by law.
- Hodge Lifetime may also use my information to contact me/us about its products and services that it believes may be of interest to me/us. If you would prefer not to receive marketing promotions from Hodge Lifetime please tick this box.

### Use of my personal data

- The personal details I give on this form will be subject to the provisions of the Data Protection Act 1998 (the Act)
- The information will be retained by Julian Hodge Bank Limited who is the data controller, and may be stored on paper or an electronic medium.
- I have the right to see my personal information held on Hodge Lifetime's files; to do this I must put my request in writing and may be asked to pay a reasonable fee.
- Telephone calls may be monitored and/or recorded in the interest of security and to help improve our service.

### Signed (1)

Signed

D D M M Y Y

### Signed (2)

Signed

D D M M Y Y

Please inform us immediately if, during the application process, you appoint a different financial adviser (where applicable) or solicitor to act for you.

## For Advisor use only

### Adviser Declaration

Company Name

Name of Advisor/  
Supervisor

Address

Telephone/ Fax

Email

Your firm

If relevant, your principle/network

FCA Firm reference number

Date of advice

Mortgage Club and/or  
Network (if applicable)

Broker Fee  
(if applicable)

Declaration

I confirm that I have provided/supervised\* the advice and recommendation with regard to the transfer of this mortgage to another property (\* delete as appropriate)

Signature

  
Signed

Print Name

  
Signed

Only complete this page if advice is being provided in relation to this application.

Please post this application and all supporting documents to:  
Hodge Lifetime, Application Administration, One Central Square, Cardiff CF10 1FS.

## Get in touch

Freephone: 0800 731 4076

Email: [info@hodgelifetime.co.uk](mailto:info@hodgelifetime.co.uk)

Hodge Lifetime, One Central Square, Cardiff, CF10 1FS

[www.hodgelifetime.co.uk](http://www.hodgelifetime.co.uk)