

## Mortgage porting application form

**IMPORTANT: Make sure you read and complete ALL sections and sign and date the application form.**

We will only consider like for like – no increase in borrowing. We only need the application - that needs to be emailed to [porting@osb.co.uk](mailto:porting@osb.co.uk). After review, we will require the administration fee £140 and valuation fee. If shared ownership - Memorandum of Sale.

We're delighted that you've chosen to apply to port your existing mortgage to your new home. We'll do everything we can to make sure that your application is processed as quickly, efficiently and smoothly as possible. You can help make this happen by ensuring all the questions have been answered.

**Under no circumstances should you sign a blank application form.**

### 1 Intermediary details

Please give information in the spaces provided or tick the appropriate boxes.  
Please use **BLOCK CAPITALS** and **ANSWER ALL QUESTIONS**.

Forename	<input type="text"/>	FCA status	<input type="text"/>
Surname	<input type="text"/>	FCA number	<input type="text"/>
Registered company name as per FCA*	<input type="text"/>	Principal company name	<input type="text"/>
*Please do not enter a trading style of the FCA registered company name.		Principal FCA number	<input type="text"/>
Registered address			
<input type="text"/>			
<input type="text"/>			
<input type="text"/>			
Postcode <input type="text"/>			

### 2 Intermediary fees

Is the intermediary charging the applicant a fee for this application?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Amount	<input type="text"/>	Fee description <input type="text"/>
Refundable amount	<input type="text"/>	When payable <input type="text"/>

### 3 Submission route details

How was the sale made?	Advised <input type="checkbox"/>	Execution <input type="checkbox"/>	Was the advice rejected?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Is the application being submitted via a partner mortgage club?*	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Mortgage club (if applicable)	<input type="text"/>	
Is the application being submitted via a partner packager?*	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Packager (if applicable)	<input type="text"/>	
Is the application being submitted via a partner network?*	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Network (if applicable)	<input type="text"/>	

\*Our partner clubs/networks/packagegers are found via [kentrelianceforintermediaries.co.uk/about-us](http://kentrelianceforintermediaries.co.uk/about-us)

**4 Existing Kent Reliance mortgage details**

Account number

Names of Account Holders (1)

Names of Account Holders (2)

Balance outstanding

Security address

Postcode

**5 Shared ownership** YES  NO 

**If YES**

Housing association  Percentage being purchased

Rental/service charges  Estimated value/  
purchase price of share

**6 Loan details**

Loan amount  Source of Deposit

Loan term (years)  If interest only- Repayment Strategy

Purchase price  Repayment type (C&I/IO/P&P)

**7 Property details**

Property address

Postcode

Property description

Number of storeys in building

Floor on which flat is situated

Does the building have a lift? Yes  No

Is the property a new build? Yes  No

Development name

Is the property standard construction? Yes  No

Number of bedrooms

Number of kitchens

Type of sale

Tenure

Remaining lease

Ground rent per annum

Service charge per annum

Is it a Grade I listed property? Yes  No

Are there any incentives, discounts or allowances in relation to the property? Yes  No

If **YES**, please give details (type of incentive)

Incentive value

**8 Property access details**

Contact name  Contact tel

Please provide any additional information which will help the valuer to gain access

Multiple horizontal lines for providing additional information.

**9 Occupancy details**

Will the property be occupied by the applicant(s) or a family member now or in the future? Yes  No  Will this be the applicants' main residence? Yes  No

**10 Other occupants**

Upon completion, will there be other occupants living at the property who are aged 17 or over? Yes  No

If YES:

First name  Surname   
Date of birth  Relationship

First name  Surname   
Date of birth  Relationship

First name  Surname   
Date of birth  Relationship

First name  Surname   
Date of birth  Relationship

**11 Solicitor's details**

Solicitor contact name  Firm name   
Solicitor tel  Solicitor address   
Email address  Postcode

## 12 How we use your personal information

We collect and use your personal data in accordance with our privacy policy, which can be found at [kentreliance.co.uk/legal/privacy-policy](https://kentreliance.co.uk/legal/privacy-policy) or can be obtained by contacting our Head Office.

### In Summary:

- We may collect various types of information about you. This includes information you give us, information we collect automatically when you use our banking services online and information that we receive from third parties such as credit reference agencies and fraud prevention agencies.
- We use information held about you in order to provide our services to you, to improve and market our services and to comply with legal and regulatory requirements (for example, anti-money laundering obligations).
- Under applicable data protection law, we may not process information about you unless we have a legal basis to do so. The legal bases on which we rely to process your personal data are:
  - Processing of your data is necessary for the performance of a contract to which you're party, to or to take steps at your request prior to entering into a contract
  - Processing of your data is necessary for compliance with a legal obligation, which we're subject to
  - We've obtained your consent
  - Processing your data is necessary to protect your vital interests or the vital interests of another person
  - Processing of your data is necessary for the purposes of the legitimate interests pursued by us or by a third party, except where such interests are outweighed by your interests, fundamental rights and freedoms
- We may share information about you with other members of the OneSavings Bank group of companies. We may also disclose your information to certain third parties such as suppliers, subcontractors, actual or potential business partners, credit reference agencies and fraud prevention agencies and other third parties we're legally required to share it with (e.g., our regulators)
- We typically store your information in the UK. In certain instances, however, your information may be transferred to jurisdictions outside of UK. Where it is, we'll take all steps reasonably necessary to ensure that your information is treated securely and in accordance with our privacy policy
- We'll retain your information for the period necessary to fulfil the purposes for which the information was collected. After that, we'll delete it. The period will vary depending on the purposes for which the information was collected, and if the information is subject to any specific legal or regulatory requirements
- You may have some or all of the following rights in respect of information that we hold about you: (i) request us to give you access to it; (ii) request us to rectify, update, or erase it; (iii) request us to restrict our use of it, in certain circumstances; (iv) object to our use of it, in certain circumstances; (v) withdraw your consent to our use of it; (vi) data portability, in certain circumstances; (vii) opt out from our use of it for direct marketing; and (viii) lodge a complaint with the Information Commissioner's Office. You may contact us using the details on our website or by contacting our data protection officer directly to exercise any of these rights
- We use appropriate technical and organisational measures to protect your information, and our online banking services are provided using secure servers.

We may update our privacy policy from time to time. Any changes we may make in the future will be posted on our website. We recommend that you revisit [kentreliance.co.uk/legal/privacy-policy](https://kentreliance.co.uk/legal/privacy-policy) regularly to stay informed about how we use your information.

## 13 Marketing preferences

The Kent Reliance Group\* would like to contact you by post, telephone, email and/or text message with information about offers, products and services that it believes may interest you. If you're happy to receive this information, please select 'Yes' below.

**I want the Kent Reliance Group to contact me with information about offers, products and services:**

1st Applicant Yes  No  2nd Applicant Yes  No

The Kent Reliance Group would like to share your details with other carefully selected third party partners so that they may contact you by post, telephone, email and/or text message with information about offers, products and services that they believe may interest you. If you're happy to receive this information, please select 'Yes' below.

**I want the carefully selected third party partners to contact me with information about offers, products and services:**

1st Applicant Yes  No  2nd Applicant Yes  No

You can change your preference at anytime by contacting Kent Reliance at your nearest branch, by calling us on **0345 122 0033** or emailing us at [mail@krbs.com](mailto:mail@krbs.com)

\*The Kent Reliance Group includes: krbs, krbs.com, Kent Reliance Banking Services and Kent Reliance

## 14 Adequate explanations (for all applications)

I have provided the applicant(s) with the required information and documentation.

**15 For brokers only**

Please note, by ticking this box, you confirm you have read and understood our Broker terms of business which can be found here:

[kentrelianceforintermediaries.co.uk/group-introducer-agreement](http://kentrelianceforintermediaries.co.uk/group-introducer-agreement)

**16 Consent and declaration**

By signing this application form you are:

1. Confirming that you have read the section entitled 'How we use your personal information'.
2. Jointly and severally, making the declaration below and giving the authorities set out within:
  - a) I am/We are aged 18 or over and I/we apply for a loan with Kent Reliance Banking Services which is to be secured on the property named in section 15 of this application form;
  - b) I/We declare that to the best of my/our knowledge and belief all the particulars I/we have given are true, accurate and complete and I/we declare that there are no other matters which Kent Reliance Banking Services should take into account when considering this application;
  - c) I/We agree to notify Kent Reliance Banking Services immediately if any of the information given in this application form ceases to be correct before completion of the mortgage;
  - d) I/We agree that if I/we have given any information (or if any information has been given on my/our behalf) which I/we know to be incorrect or which I/we have not checked and which is subsequently shown to be incorrect, I/we will pay all reasonable fees, expenses and costs incurred by Kent Reliance Banking Services in connection with processing this application and any resulting loan;
  - e) I/We authorise Kent Reliance Banking Services to obtain a surveyor's report and valuation on the property named in section 15 of this application form which is offered as security at my/our expense;
  - f) I/We understand that it is for me/us to satisfy myself/ourselves as to the value and condition of the property and that it would be sensible for me/us to arrange for a surveyor to carry out either a homebuyer's report or building survey;
  - g) I/We agree to pay all relevant application and other fees as set out in the document entitled "Mortgage fees and charges" (as amended from time to time);
  - h) In the event of Kent Reliance Banking Services making a mortgage offer, I/we waive any right to claim lawyer/client confidentiality or legal privilege in respect of all information relative to Kent Reliance Banking Services' decision to lend and authorise Kent Reliance Banking Services and its advisers to liaise with my/our professional advisers to progress my/our application;
  - i) I/We accept that in the event of the facility, for whatever reason, not proceeding to completion, I/we will be solely responsible for all legal, survey and other costs and disbursements of whatever nature incurred by Kent Reliance Banking Services or its advisers in connection with this application;

- j) I/We certify that I/we have never been declared bankrupt or made any arrangements with creditors or suffered any act indicative of insolvency or anything equivalent in any other country, or been a director or material shareholder of a company that has gone into insolvent liquidation or administration, or had a receiver appointed of its assets or undertaking, or made arrangements with creditors, or suffered any act indicative of insolvency or anything equivalent in any other country, in each case, unless as advised in section 14 of this application form;
- k) I/We confirm and understand that Kent Reliance Banking Services is subject to anti-money laundering and counter terrorist financing legislation and regulation, and as such is required to verify my/our identity. I/We undertake to provide Kent Reliance Banking Services with all documentation and assistance (on an ongoing basis) as may be required to enable it to comply with such regulations, and in so doing warrant that such information is true, accurate and complete in all respects;
- l) I/We confirm that I/we have not been convicted of or cautioned for (or charged but not yet tried for) fraud, theft, arson, robbery or any other criminal offence (other than a motoring offence). I/We also declare that, upon becoming aware that any other person who will live in or use the property after completion of the mortgage has been convicted of or cautioned for (or charged but not yet tried for) any such offence, I/we will notify Kent Reliance Banking Services immediately;
- m) I/We confirm that if I/we proceed with a mortgage offer from Kent Reliance Banking Services, I/we understand that the property named in section 15 of this application form is at risk if I/we do not keep up with the payments on (or otherwise comply with) any such borrowing and I/we further confirm that Kent Reliance Banking Services has advised me/us to obtain and rely on legal advice;
- n) I/We authorise Kent Reliance Banking Services, for credit assessment purposes, to make enquiries of such parties as it deems appropriate, including, but not limited to, my/our current or previous employer, banker, accountant, landlord, financial adviser, HM Revenue & Customs, the DWP or any other Government body or any other person or entity in order to check the information that I/we have given or which has been given on my/our behalf or to obtain further information about me/us that Kent Reliance Banking Services considers relevant to this application. I/We authorise such parties to supply any information so requested by Kent Reliance Banking Services; and
- o) I/We authorise Kent Reliance Banking Services to collect mortgage payments by direct debit.

The confirmation and declaration set out above is made to OneSavings Bank plc, which trades as krbs, Kent Reliance Banking Services and Kent Reliance and references to those trading names are to OneSavings Bank plc.

**1st Applicant signature**

Date   /   /

**2nd Applicant signature**

Date   /   /

**UNDER NO CIRCUMSTANCES SHOULD YOU SIGN A BLANK APPLICATION FORM.**



krbs, Kent Reliance Banking Services and Kent Reliance are trading names of OneSavings Bank plc. Registered in England and Wales (company number 7312896). Registered office: Reliance House, Sun Pier, Chatham, Kent, ME4 4ET. OneSavings Bank plc is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (registered number 530504).  
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