Intermediary Rate Switch Request Form



Rate switch products can be viewed at: hodgebank.co.uk/intermediaries/product-rates rate switch requests can only be requested by registered intermediaries.

Intermediary registration forms can be found at hongebank.co.uk/intermediaries/registration

If you have any queries regarding registration, Please contact us on 0800 138 9109 or retentionsupport@hodge.co.uk

Rate Switch Details	
Customer name	
Customer email (Electronic Signature only)	
Security Address	
	Postcode
Customer's current product (50+/RIO/Retirement Mortgage/Holiday Let)	
Account number	Current product expiry date
New product code	
Product fee	£
	Add to loan Pay upfront
Name of intermediary	
Company name and address	
	Postcode
FCA Reference number	Your firm If relevant, your principle/network
Intermediary fee (if applicable)	3
Payment club/network	
I can confirm that I have authorisation from the customer(s) to obtain data on their behalf and confirm that advice and recommendation has been given in respect of the rate switch request.	
For Retirement Mortgage only – I confirm that I have passed an appropriate approved examining board's specialist examination in equity release and I have provided/supervised the equity release advice and recommendation.	
Signed	Print name D D M M Y Y

Hodge is a trading name of Julian Hodge Bank Limited which is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority under registration number 204439. Registered office in England & Wales is One Central Square, Cardiff, CF10 1FS (No.743437). Hodge's Privacy Notice confirms how we manage and process your personal data. If you require more detail on how we handle your information please go to hodgebank.co.uk/privacy or call 0800 289 358.

retentionsupport@hodge.co.uk



hodgebank.co.uk/intermediaries

0800 138 9109