

Product transfer request form



Client 1 details		Client 2 details	
Name		Name	
Date of birth		Date of birth	
Mortgage account number			
Security address			

Clients in vulnerable situations.

Are any reasonable adjustments needed to support the client(s) in making this Application?	
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If the above answer is “yes” then please contact us to discuss further.

Eligibility question

Has the client already applied online, returned the paper product options letter, or applied through their Coutts Private Banker?	
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If the above answer is “yes” then please refer the client directly to their Coutts Private Banker.

Interest only questions

Is any part of your clients’ mortgage interest only?	
Has the client changed the Credible Repayment Strategy (CRS) since their last application	
If yes, what is the new CRS	

Please note that your clients CRS should be both suitable and affordable and remind them that it is their responsibility to have a plan in place to repay the mortgage balance at the end of the mortgage term.

New product details

Please list the Mortgage Numbers for the elements you wish to transfer to a new rate (<i>or state, “all” if all elements are being transferred</i>)	1	
	2	
	3	
	4	
	5	

Selected rate (Please see the Rate Sheet for our current mortgage rates.)

Product type (i.e. 2-year fixed rate)	
Interest rate (i.e. 4.59%)	
Date of rate sheet	
Will all elements being switched move to the same rate?	
If no, please state the mortgage elements switching to this rate	

Clients looking to complete a product transfer to a Mortgage Reserve Account, Offset Select Account or Short-Term Tracker mortgage product should be referred to their Coutts Private Banker.

Please complete below if more than 1 product type is being recommended

Additional product type (i.e. 2-year tracker rate)	
Interest rate (i.e. 4.59%)	
Date of rate sheet	
Please state the mortgage elements switching to this rate.	

Effective date

When should the new rate start?	
Will there be an Early Repayment Charge (ERC) to Pay?	
If yes, please provide a brief rationale for starting the new rate during the ERC period.	

Intermediary details		Fee details	
Firm name		Intermediary name	
Firm address		Fee payable to the intermediary by the client	
Intermediary phone number		Payment path	

Intermediary declaration

By submitting this Product Transfer Proforma I, the Intermediary, confirm that:

- The details in this application are submitted on behalf of the applicant(s) named in this request and with their consent
- I have verified the identity of the applicant(s).
- I have read the [Terms of Business](#) and agree that these Terms will apply to the processing of this application and all related business.

Please tick this box to confirm as the intermediary you have read and agree to this declaration.