Broker Customer Information Request Form

This form is to be completed by Intermediaries registered on the Gatehouse Bank Portal. It is to be used by the Intermediary to obtain written authority from the customer to act on their behalf to transfer to a new product.

Once you have completed the form, please ask your customer to sign and date the form in the box provided and instructions of where to send it are at the end.

For more information on product transfers, please refer to the Product Transfer Process on the Bank's website.

Section A – Broker Details

Broker Name:	
Broker Company Name:	
FCA Reference Number:	
Contact Telephone Number:	
Email address:	
Broker Fee:	

Section B – Customer Details

Customer Name(s):		
Account Number:		
Correspondence Address:		
	Postcode:	
Contact Telephone Number:		
Email address:		
Broker Fee:		

Section C – Broker Declaration

I confirm that I have been authorised by the customer(s) above to receive the information detailed in section E. The information will only be used in conjunction with the needs of the customer(s). I accept responsibility for the security of any information provided to me.

Signed:		Date:	

Section D – Customer Declaration

I/We agree that you may update the broker detailed above with the finance information detailed in section E of this form, and no other information, other than that detailed in section E, will be provided to the Broker as part of this request. By signing this form I confirm I am acting on behalf of all parties to the finance agreement and have sought their prior permission.

Signed:		Date:	

Signed:		Date:	

Section E – Existing Finance Details (for bank use only)

With reference to the above, please see below the requested information.

Date information provided on (and correct on):	

Account Number	Balance	Current Fixed Rent Rate	Fixed Finance Maturity Date	Finance Maturity Date	Follow on Rate	Rent only / Acquisition

BROKERS ONLY:

Once this form has been fully completed, please:

1) Return via email to: gatehouse.servicing@gatehousebank.com

2) For us to process this request and give the best possible service, please note your relationship manager's name in the 'subject field' of your email and ensure that all details above are completed accurately. Please also ensure that the customer and broker declarations are signed and dated.