

Product Transfers

How to arrange a Product Transfer for your clients

Version 1



Product Transfers: A Step-by-Step Guide



If your client is coming to the end of their fixed rate, product transfers* make it as simple as possible for them to switch to a new Fleet mortgage. We are often asked how product transfers work, so we've put together this short guide to help you through the process.

Contact our friendly Sales team on 01252 916 800 to confirm your client's eligibility. Please make sure you have your client's account number to hand

If your client is eligible for a product transfer, a member of our team will send you an email detailing the process with a KFI request form

Return the completed KFI request form to our Mortgage Services team: mortgageservices@fleetmortgages.co.uk

3

A KFI will be sent via DocuSign. This will be sent to your email address first and then to your client once you have signed

Our Mortgage Services team will send an acknowledgement to inform you we have received the acceptance We must receive a signed acceptance at least 15 working days prior to the end of the fixed rate period for the product transfer to be implemented from the 1st of the following month

The product transfer cannot complete before the fixed term of the existing loan has expired (Please note: Fleet will not backdate this if the product switch completes after)

^{*} Product transfers are subject to eligibility. Please contact the team at Fleet prior to making an application for a product transfer to ensure your client is eligible and to discuss other possible options.



See how we can help 01252 916 800 fleetmortgages.co.uk