

Lifetime Mortgage

Change of Servicing Rights Form

Once you've completed this form, please return it to:

Legal & General Home Finance
PO Box 17225
Solihull
B91 9US

Important information

This form confirms:

- Your consent for an adviser to access details about your Legal & General Lifetime Mortgage. When your adviser has been appointed, we will give them information about your lifetime mortgage and, where appropriate, provide them with other information about your dealings with us to enable them to give you informed advice.
- We will also transfer future servicing rights on your account and any future commission will be paid to the below named adviser and firm. Servicing rights give an advice firm the ability to advise you on your lifetime mortgage and act on your behalf. By transferring servicing rights you are changing from your original advice firm to the firm that you indicate on this form.

This form will not:

- Authorise your adviser to operate the account or make any decisions on your behalf. Please discuss this decision and the implications with your adviser prior to completing the form.

How the adviser consent process works

1. Identify the adviser you wish to deal with us on your behalf.
2. Both you and your adviser will need to complete and sign this form.
3. Once the form is complete, please return it to the address above.
4. When we receive your form we will process this and if we have any queries we will contact you.

A. Customer details

Account number	<input type="text"/>
Full name(s)	Account holder 1 <input type="text"/>
	Account holder 2 <input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
Postcode	<input type="text"/>
Contact phone number	<input type="text"/>

B. Adviser details

Please give details of your adviser below:

Full name	<input type="text"/>
Company name	<input type="text"/>
FCA reference number	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
Postcode	<input type="text"/>

Once my account has been transferred to the above-named adviser, please:

Inform my previous adviser Do not inform my previous adviser

Customer signature(s)

Signature 1	<input type="text"/>	Date of signature (dd/mm/yyyy)
		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Signature 2	<input type="text"/>	Date of signature (dd/mm/yyyy)
		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

Adviser signature

Signature	<input type="text"/>	Date of signature (dd/mm/yyyy)
		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

By signing this document, you are instructing Legal & General Home Finance to transfer servicing rights to the above named firm and enabling them to take responsibility for all future drawdown advice.

Compliance Officer/Company Director signature

Signature	<input type="text"/>	Date of signature (dd/mm/yyyy)
		<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>

By signing this document, the above named firm assume all servicing rights on the account, and take responsibility for all future drawdown advice.

For further information

Visit legalandgeneral.com/lifetimemortgages

Or call us on **03330 048 444**.

Lines are open 8.30am – 5.30pm, Monday to Friday.

Call charges will vary. Calls may be recorded and monitored.

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