

Interest Only Mortgage

Please indicate on the form below the details of your plan to pay off your original loan by the end of your mortgage term. Please fill in as much detail as you can and then return to us in the envelope provided. Select which of the 10 options below apply to you and complete that section of the form.

SWANSEA
BUILDING SOCIETY

www.swansea-bs.co.uk

Name			Mortgage Account Number	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
Property Address																
1	Endowment											Tick	<input type="checkbox"/>			
2	Investments		Property	<input type="checkbox"/>	Stocks & Shares	<input type="checkbox"/>	Other	<input type="checkbox"/>	Tick	<input type="checkbox"/>						
3	Pension plan lump sum											Tick	<input type="checkbox"/>			
4	Savings											Tick	<input type="checkbox"/>			
5	Selling your home		Estimated Sale Date	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Tick	<input type="checkbox"/>	
			Estimated Current Property Value	<input type="text"/>												
6	Remortgaging elsewhere		Estimated Remortgage Date	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Tick	<input type="checkbox"/>	
			Estimated Current Property Value	<input type="text"/>												
7	Switching to repayment		When do you plan to switch?	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Tick	<input type="checkbox"/>	
			How much of your mortgage do you plan to switch?													
			All	<input type="checkbox"/>	Part	<input type="checkbox"/>	£ if Part	<input type="text"/>								
8	Monthly overpayments		When do you plan to start?	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Tick	<input type="checkbox"/>	
			I currently overpay by:	<input type="text"/>				I plan to overpay by:	<input type="text"/>							
9	Other plan		What is your plan?	<input type="text"/>									Tick	<input type="checkbox"/>		
			When will you have access to funds?	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
			Expected amount	<input type="text"/>				Is your plan on track?	Yes	<input type="checkbox"/>	No	<input type="checkbox"/>				
10	I have no plan in place to repay my mortgage at the end of the term and would like to arrange to see a Society Manager to discuss options											Tick	<input type="checkbox"/>			
Contact	Please confirm your telephone number for our records <input type="text"/>															

We would like to thank you for taking the time to complete this form. Please sign below to confirm that the details captured above accurately reflect the plans you have in place to repay your loan by the end of the term. Whilst we have asked for this information to update our records, it is your responsibility to regularly review your plan to ensure it is on track to repay the mortgage balance in full when due.

Signed			Date	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	/	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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