



PROGRESSIVE

BUILDING SOCIETY

Providing confirmation of authority to act on behalf of a Society Customer

Guidance for Intermediaries

Where you did not originally introduce a mortgage to the Society and you now wish to act on behalf of a Society customer, we require authority from the customer(s) authorising you to act as their intermediary.

Authority can be given in two ways:

- (i) You can ask the customer to email their authority to us. We have provided a template below showing the information we require in the body of the email. Please ensure you ask your client(s) to email their authority to mortgagesupport@theprogressive.com
- (ii) The customer can sign a letter of authority and the signed letter can be emailed to mortgagesupport@theprogressive.com Please refer to the template below for suggested wording.

On receipt of the authority, we will confirm to you when we have provided access to allow you to complete a product switch (where applicable) and / or provide the information you require.

Template

To Progressive Support Team

Borrower(s) Name(s): Please complete in full (if joint names – please state all names)

Borrower(s) Address: Please complete in full including postcode

Mortgage Account Number: Please complete (if more than one account, please state all account numbers)

I / We confirm that I / we authorise the following Mortgage Intermediary to act on my / our behalf:

State Mortgage Intermediary Name, Firm's Name, Address, Contact Number

I / We confirm that the Mortgage Intermediary, stated above, can request details of our account(s), numbered above, with the Society, can request information regarding our account(s) and can complete changes on our behalf.

Yours sincerely

All customer(s) names at the foot of the email or all to sign if providing a letter.

08/23