Broker Product Switch

For Intermediary use only



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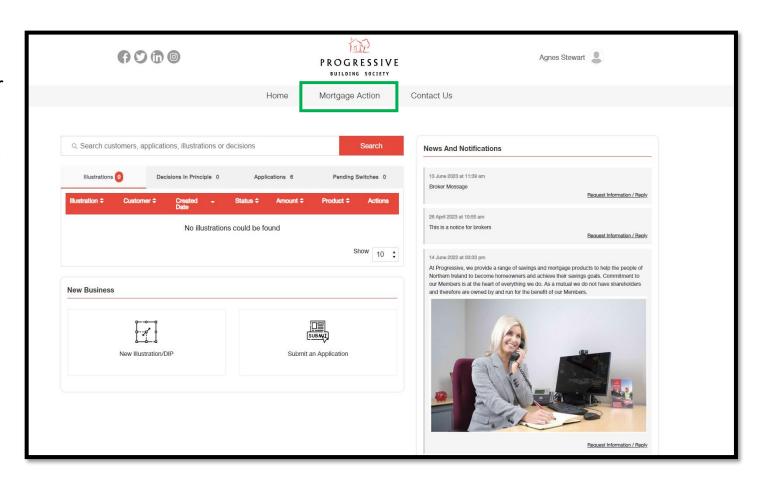
About this Guide

This guide will provide you with an overview of how to generate a Product Switch for brokers. It will explain how to begin the process of switching a client's product, input client details, select a new level of service, and select a new product.

If you need any help generating a Broker Product Switch or have any questions regarding our broker portal in general, please call our Online Support Team on 0800 0294 997. Lines open Monday – Friday, 9.00am – 5.00pm. Alternatively, write to our head office: 33-37 Wellington Place Belfast BT1 6HH.

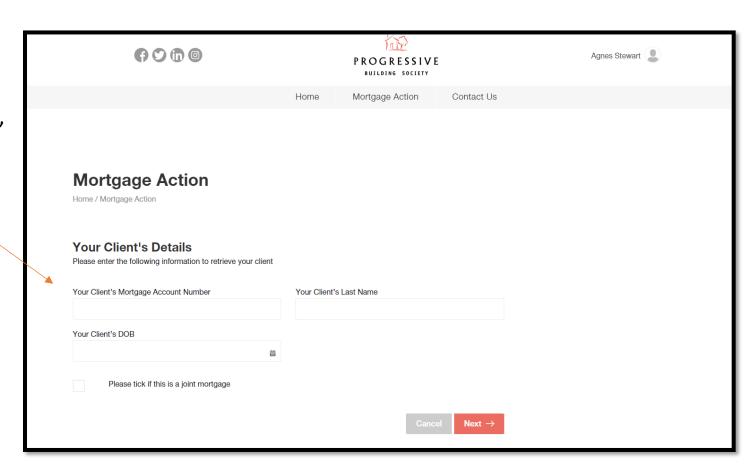
Generate a Broker Product Switch – Mortgage Action

To begin generating a broker product switch, click on 'Mortgage Action' located at the top of the broker homepage (highlighted).



Generate a Broker Product Switch – Client's Details

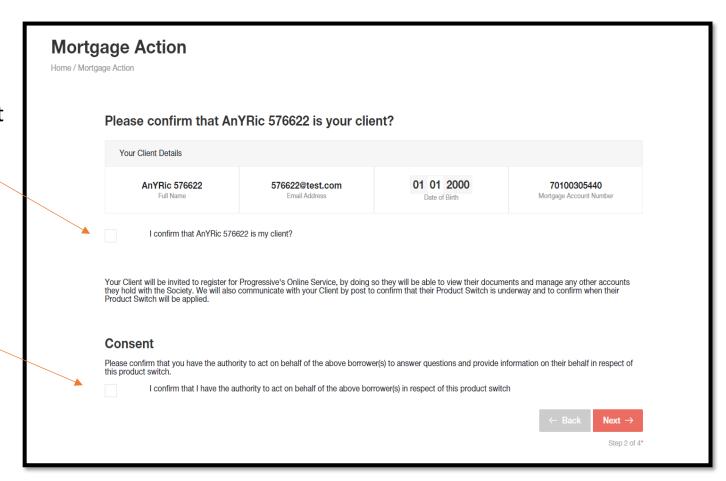
Enter your client's Mortgage
Account Number, Last Name,
Date of Birth and confirm
whether the mortgage is a
joint mortgage or not.



Generate a Broker Product Switch - Confirmation and Consent

Confirm that the customer whose information appears is indeed your client. Tick the first checkbox to confirm.

Please then confirm you have authority to act on behalf of your client by ticking the second checkbox under 'Consent'



Generate a Broker Product Switch – New Interest Rate Deal

To continue the journey please click 'Choose a New Interest Rate Deal'.

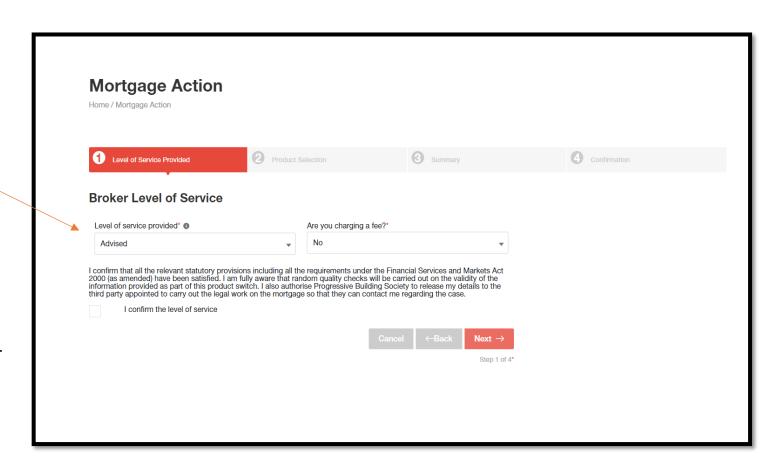
If you wish to Change
Mortgage Term, Change
Repayment Type or Make a
Capital Repayment, you will
have to contact your branch
by another means.



Generate a Broker Product Switch – Level of Service Provided

Confirm the broker level of service – select either 'Advised' or 'Execute Only' from the drop-down field.

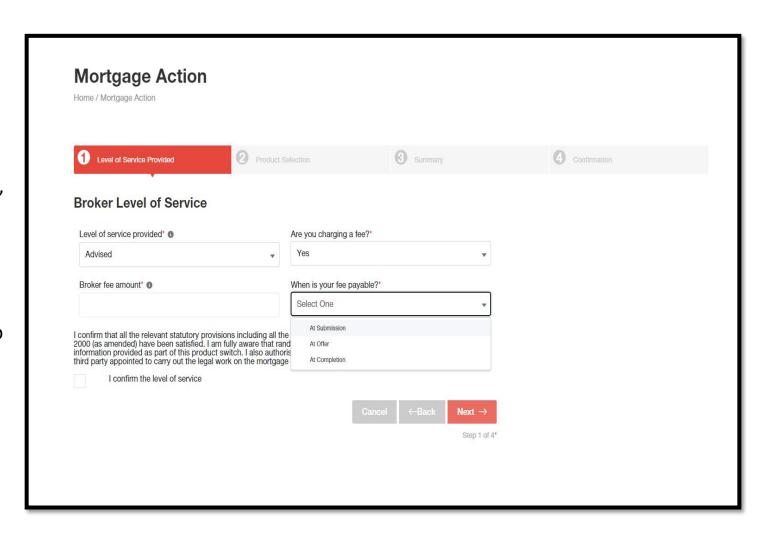
Confirm if you are charging a fee or not by selecting 'Yes' or 'No' from the dropdown field.



Generate a Broker Product Switch – Level of Service Provided (cont.)

If you are charging a fee, enter the amount that you are charging as well as inputting when the fee is payable – select either 'At Submission', 'At Offer' or 'At Completion' from the drop-down field.

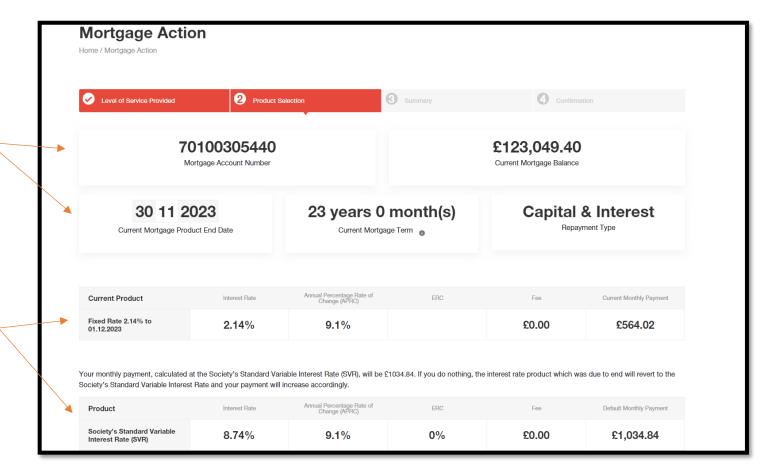
Please then tick the checkbox to confirm the level of service.



Generate a Broker Product Switch – Product Selection

On screen 2 you will firstly be presented with information about the current product - including current mortgage balance, the end date, and the mortgage term.

Information is also presented regarding the monthly repayment calculated by the Society's Standard Variable Interest Rate (SVR).



Generate a Broker Product Switch – Product Selection (cont.)

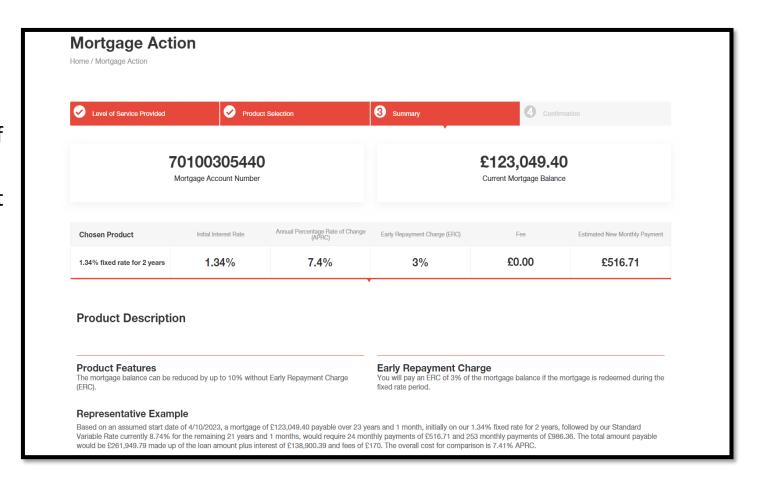
When you scroll down, you will be presented with available products based off the information that has been provided.

Please view each available product's information and select a suitable product.



Generate a Broker Product Switch – Summary

On screen 3, you will be presented with a summary of the product you have selected - including a product description which provides a summary of product features, early repayment charge and representative example.



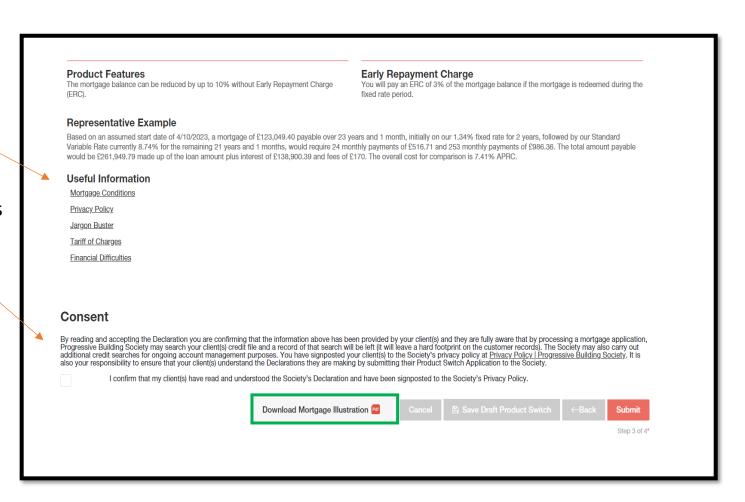
Generate a Broker Product Switch – Summary (cont.)

When you scroll down you will be presented with a list of external documents you may open if desired.

If you are happy that the client has read and understood the Society's Declaration, click the checkbox to confirm.

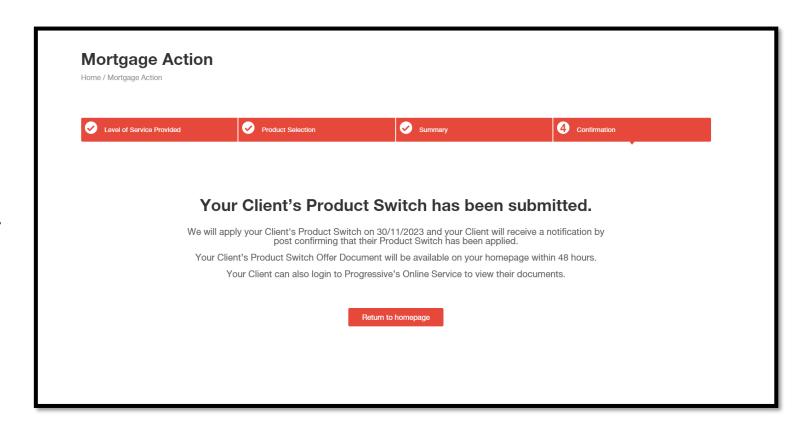
You may also download the new mortgage illustration (highlighted).

Click the submit button to submit the product switch.



Generate a Broker Product Switch – Confirmation

Congratulations! You have successfully submitted the product switch. You may now return to the homepage.





We hope you found this guide helpful and informative.

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