

Intermediaries and investment
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distribution

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Helping your client accept their product transfer

 Santander for Intermediaries

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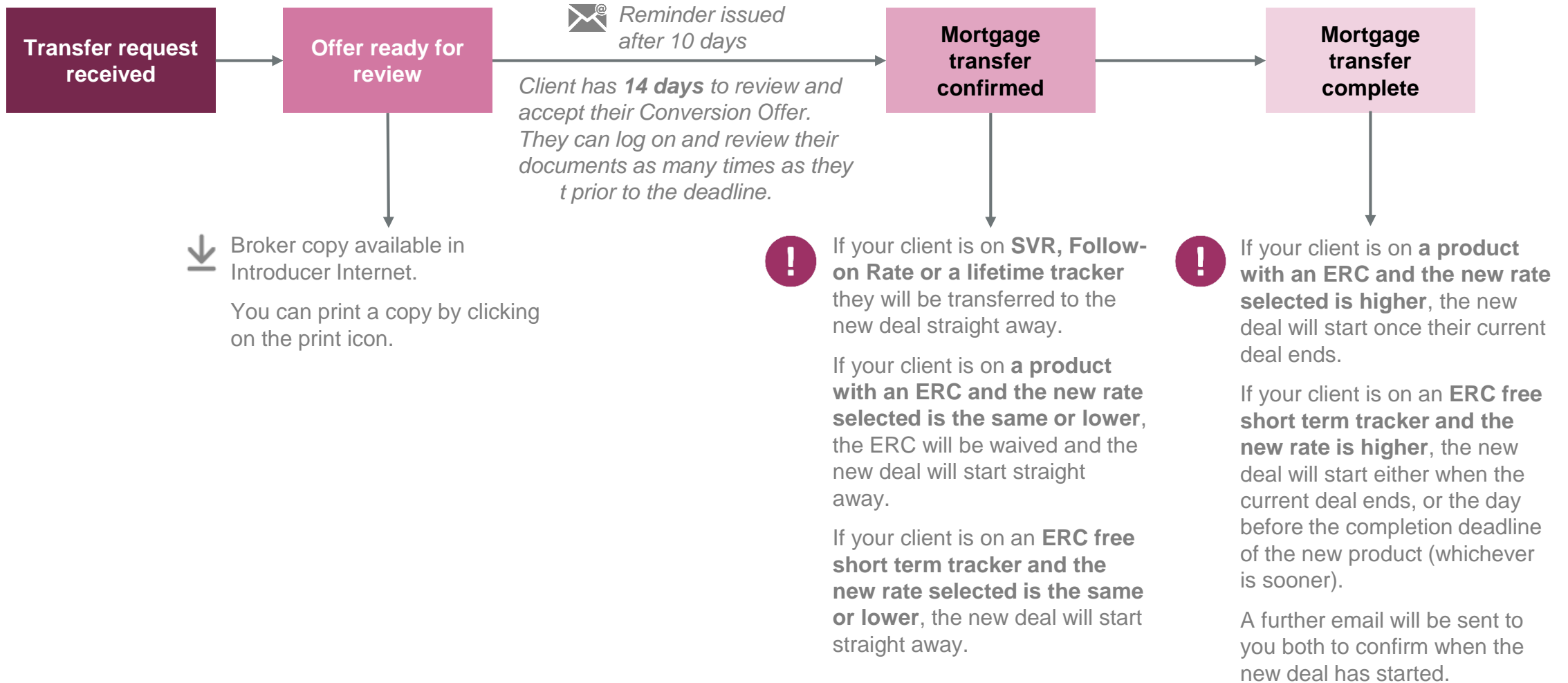
[Acceptance confirmed – what happens next?](#)



-  Information that you'll need to know when completing the application form.
-  Top tips for completing the application form.
-  Important information that you must be aware of when completing the application form.


Case tracking – keeping you updated

We'll send you and your client case tracking updates by email and text message at each key stage of the process.



Offer ready for review

We'll send you both a MATS message when your client's offer is ready to review. Your client's email will include their unique offer reference number and a link to santander.co.uk, where they can log in securely to access their offer.

Customer email content

Dear <First Name> <Surname>

Your request has now been processed and your mortgage transfer documents are ready to review and accept online.

Your unique offer reference number is: OLAXXXXXXXXXX

You have until DD/MM/YYYY to log on, review and accept the product transfer offer. Any account holder can accept on behalf of all parties. Before accepting, make sure you review all of the information carefully as it will form part of your mortgage contract.

What you need to do

- Access your documents by visiting the 'Accepting your deal' page within the Mortgages section of our website
- Click on the 'Continue' button at the bottom of the page
- Enter your unique offer reference number to retrieve your offer

Don't click the log on button at the top of this page because it will take you into our Online Banking site and you can't accept your deal here.

When you confirm your acceptance, we'll progress your product transfer - you won't be able to cancel the transfer or request another mortgage deal. Also, you won't be able to make any other changes to your mortgage until the transfer is complete.

Need help?

- For product transfers arranged online directly with Santander please call 0800 051 0803. Lines are open 9am to 7pm Monday to Friday and 9am to 2pm Saturdays.
- If you arranged your product transfer through a financial adviser/mortgage broker please contact them directly.

Kind regards,
Santander

Your application tracking page
[Track and manage your mortgage application here](#)



If your client has any questions or problems accepting their deal they should contact you directly.



Your client will have **14 days to accept their Conversion Offer**. The email sent to you and your client will confirm the date the offer must be accepted by.

Your client can log on, view, print and download their offer as many times as they like before the deadline.



A paper offer will **only** be posted to the customer if:

- their mortgage is held on one of Santander's legacy systems, **or**
- the customer wishes to pay a product fee upfront.


In all other cases, the Conversion Offer will be sent electronically and can be downloaded, saved and/or printed.

Accepting your deal

Santander Current Accounts Credit Cards Insurance Loans Mortgages ISAs & Savings Investments Help and Support Log on Online Banking

You are in [Personal](#) > [Mortgages](#) > [Already have a Santander mortgage](#) > [Changing deals](#) > [Accept your deal online](#)

Existing mortgage customers accepting your deal

**View and accept your new deal today**

You can accept your new deal by clicking on 'Continue' below.

You'll need the unique offer reference that we emailed you, and we suggest you read through these important documents first:

- [Santander Tariff of Mortgage Charges \(.pdf\)](#)
- [Standard Mortgage Terms and Conditions \(.pdf\)](#)
- [Terms of Business \(.pdf\)](#)
- [Account Fee \(.pdf\)](#)

These documents replace any previous versions and form part of your mortgage contract.

If you've transferred your mortgage product directly with Santander

- There's no transfer fee. Your Conversion Offer will tell you about any fees relating to your mortgage.
- We only offer our own mortgages.

If your transfer was completed by an Independent Financial Adviser

- You'll have been told about any fees that may apply.

What to do next

Any account holder can accept on behalf of all parties, but for the transfer to take place acceptance must be confirmed before the date provided in your email.

Please make sure you have the unique offer reference for the deal you want to accept. If you applied more than once you may have received more than one reference number.

I agree to proceed based on the information and documents provided above.

Continue



We suggest your client reads through the important documents on this page before continuing.

These documents replace any previous versions and form part of their mortgage contract.



To retrieve their Conversion Offer, your client must click on 'Continue' at the bottom of this page.

Retrieve your offer

Santander Your details are secure

Accepting your new deal

Retrieve your offer

Your offer reference number * ?

e.g. OLA0000123456

Surname *

Date of birth *

e.g. DD/MM/YYYY

Postcode *

For the property the mortgage is held against.

Continue

Important information

You have until midnight on 17/11/2016 to review and accept your offer.
Please ensure you read your offer carefully.

Continue

[Online Banking Guarantee](#) [Site Help & Accessibility](#) [Security & Privacy](#) [Legal](#)



If your client has any problems logging in to retrieve their offer, they should contact you and not Santander.

You can contact the SFI Retention Specialists on **0800 032 7865** for help with any issues.



Your client has 14 days to accept their deal.

Following a successful log in, a message will appear confirming the deadline they need to accept by.

They can log in as many times as they like before the deadline.





To log in and retrieve their offer, your client will need to enter their:

- Offer reference number – this is provided in their email and consists of 3 letters (OLA) followed by 10 numbers
- Surname
- Date of birth
- Mortgaged property postcode

Your client will have 3 attempts to log in before they'll be locked out.

Your mortgage details

Your details are secure 

Accepting your new deal


Your offer reference number: OLA0009578678


Your mortgage details

Here are the details of the loans you have requested changes to:

Loan amount	Term of loan	Repayment method	Initial interest rate payable
£108,888.84	11 years 7 months	Repayment	1.39%

Account fee
The account fee, detailed in Section 8 of your Conversion Offer, is not a product fee. As you already have a Santander mortgage this is not a new fee, it replaces any previous account fee that applied when you originally set up your mortgage. This fee can be paid once your new deal starts, or you can pay it when you redeem your mortgage, in which case the fee will not change. If you've already paid this fee you will not have to pay it again.

 To continue this process please ensure you and all other parties to the mortgage read your Conversion Offer carefully. The details set out in the Conversion Offer, including the mortgage conditions, form part of your mortgage contract.

 **Your Conversion Offer will open in a new browser window.**
Once you've seen the document return to this page to proceed.

[Close and come back later](#) [View Conversion Offer](#)



The Conversion Offer will open in a new browser window.

To accept this offer, your client needs to come back to this page to continue.



Your client can view a summary of the loans they've requested changes to.

Up to 5 loan parts will be shown here.





Click on 'View Conversion Offer' to open and review the offer.

The PDF can be downloaded, printed and saved.

Your client can log in and view their Conversion Offer as many times as they like before the deadline.

Your mortgage details

Your details are secure 

Accepting your new deal


Your offer reference number: OLA0009578678


Your mortgage details

Here are the details of the loans you have requested changes to:


Loan amount	Term of loan	Repayment method	Initial interest rate payable
£108,888.84	11 years 7 months	Repayment	1.39%

Account fee
The account fee, detailed in Section 8 of your Conversion Offer, is not a product fee. As you already have a Santander mortgage this is not a new fee, it replaces any previous account fee that applied when you originally set up your mortgage. This fee can be paid once your new deal starts, or you can pay it when you redeem your mortgage, in which case the fee will not change. If you've already paid this fee you will not have to pay it again.

 To continue this process please ensure you and all other parties to the mortgage read your Conversion Offer carefully. The details set out in the Conversion Offer, including the mortgage conditions, form part of your mortgage contract.

 Your Conversion Offer has opened in another browser window
[Download another copy](#)

[Close and come back later](#) [Continue](#)

 When the Conversion Offer has been viewed, the button will change to 'Continue'.

Accepting your deal

Santander Your details are secure

Accepting your new deal

For the conversion to take place, one of the account holders must confirm their acceptance on behalf of all account holders.

Your acceptance must be provided before the deadline specified by ticking the confirmation below and submitting this to us. Once the deadline has passed, this Conversion Offer will no longer be available to you.

Once you've confirmed your acceptance, you won't be able to cancel the transfer or request another mortgage deal. Also, you won't be able to make any other changes to your mortgage until the transfer is complete.

Once we've received your acceptance, we'll progress your product transfer and we'll send you an email or text message to confirm the date your new deal will start.

Accepting your offer
I agree to this Conversion Offer on behalf of all account holders, and I am aware that I have no right to cancel.

Accept on behalf of all parties to the mortgage

I accept this Conversion Offer

Date of signature 03 November 2016

Close and come back later **Accept Conversion Offer**



Your client should review the important information on this page before accepting their deal.



To accept the deal one account holder must tick the box to confirm acceptance to the Conversion Offer on behalf of all account holders, and click 'Accept Conversion offer'.


Once your client has confirmed their acceptance, they won't be able to cancel the transfer.

Acceptance confirmed – what happens next?



The screenshot shows a Santander confirmation page. At the top left is the Santander logo. At the top right, it says "Your details are secure" with a lock icon. The main heading is "Thank you for staying with Santander". Below this is a section titled "What happens next" with two paragraphs of text. The first paragraph says "We'll progress your product transfer and send you an email or text message to confirm the date your new mortgage deal will start." The second paragraph says "Once your new deal has started, we'll send your mortgage completion statement in the post. This will confirm the details of your new mortgage payments and when your first payment is due." Below this is a section titled "Can we help you?" with a paragraph saying "If you have not heard from us within one working day then please call us on 0800 068 6462." At the bottom left is a red button labeled "Finish".

Santander

Your details are secure 

Thank you for staying with Santander

What happens next

We'll progress your product transfer and send you an email or text message to confirm the date your new mortgage deal will start.

Once your new deal has started, we'll send your mortgage completion statement in the post. This will confirm the details of your new mortgage payments and when your first payment is due.

Can we help you?

If you have not heard from us within one working day then please call us on 0800 068 6462.

Finish



Once acceptance has been received, the product transfer will be processed within one working day.

Both you and your client will be sent an email to confirm the date the new deal starts.

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