

Intermediaries and investment
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How to submit an application for existing customers moving home

Contents

In this guide, we'll cover the key screens on Introducer Internet for submitting an application for existing Santander mortgage customers moving home. Throughout this guide, we'll use the following example:

- Purchase price: £300,000
- Mortgage: £150,000 (£100,000 porting loan amount and £50,000 top-up)
- Deposit: £150,000

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-  Top tips for completing the application.
-  Important information that you must be aware of when completing the application.

Introducer Internet –
agreement in principle

01

New agreement in principle > Application details

In this section you can enter the details for the application, including the application type and customer profile.

Application details

Application type > Advisor declaration > Policy check > **4** Application details

Please choose an application type *

Single Joint

Mortgage type *

Purchase Remortgage

Have you had or do you have a mortgage? *

Yes No

Applicant 1

Select employment type ?

Employed Self Employed Retired Other

Do you have a mortgage now? *

Yes No

Name of the Lender *

[Create Application](#)



Please select “Santander” from the drop down for the name of the current lender.



This page must be completed carefully as the answers are used to build the rest of the application. Once you click ‘Submit’ you can’t change the answers. If you make a mistake you will need to start again with a new application.

New agreement in principle > Application details

In this section you can provide your applicant's personal details.

Application AA8207688C2 You are in Application > My applications > Applicant details

Applicant details

Santander Mortgage Account Number, you can find this on your mortgage statement * ?

Title * ?

First name * ?

Do you have a middle name? * ?

Yes No

Surname *

Date of birth * ?

Gender *

Male Female

Marital status *

Has a previous name, maiden name or alias ever been used? * ?

Yes No

Do you have a partner or spouse living with you at your current address? * ?

Yes No

Do you have any financial dependents? *

Yes No



Where your client's current lender is Santander, you'll need to enter the mortgage account as shown on their mortgage statement. This question is mandatory.

New agreement in principle > Loan required > Loan details

Once you've entered the customer's details, you can provide details of the loan the applicant requires.

The screenshot shows a web form titled "Loan details" within a "New Agreement in principle" context. The breadcrumb trail is "You are in Application > My applications > Loan details". The left sidebar contains navigation options: Personal, Property portfolio, Financial, Loan required, **Loan details** (highlighted), Loan purpose, Loan breakdown, Present housing, and Declaration and submit. The main form area includes the following fields and controls:

- Mortgage required * ?**: Input field with "£ 150,000".
- Purchase price/valuation * ?**: Input field with "£ 300,000".
- Property usage ***: Dropdown menu with "Wholly Owner-Occupied Res." selected.
- Porting product? * ?**: Radio buttons for "Yes" (selected) and "No".
- Information icon (i)**: Text stating: "Before starting an application to port your client's mortgage you'll need to know the existing loan amount, product code and loan term and to avoid delays this information needs to be as accurate as possible. Your client can get this information by contacting Santander Mortgage Operations on 0800 917 5630. When they call they'll be asked to provide their Mortgage Account Number (shown on Annual Mortgage Statement) and complete an ID&V check."
- Type of product * ?**: Dropdown menu with "Fixed Rate less than 5 years" selected.
- Does the product have a cashback element? * ?**: Radio buttons for "Yes" and "No" (selected).

At the bottom of the form are "Back" and "Continue" buttons.



Make sure you select 'Yes' to porting a product. You'll also need to confirm the type of product your client currently has.



Before starting the application to port your client's mortgage, you'll need to know the existing loan amount, product code and loan term.

Your client can get this information by contacting Santander Mortgage Operations on 0800 917 5630. When they call they'll be asked to provide their Mortgage Account Number (shown on their Annual Mortgage Statement) and complete a verification of identity check.

New agreement in principle > Loan required > Loan purpose

In this section you can confirm the purpose of the loan required.

New Agreement in principle You are in [Application](#) > [My applications](#) > [Loan purpose](#)

Loan purpose

Please take care when confirming the loan purpose.
For applications on the Help to Buy: equity loan scheme or shared ownership please choose these options and don't select 'first purchase', 'smaller property' or 'larger property'.

Loan purpose *

Larger Property

[Back](#) [Continue](#)



Make sure you select the correct option for the purpose of the loan.



For customers using Help to Buy: equity loan scheme or shared ownership, please choose these options using the drop down.

Introducer Internet –
full mortgage application

02

Full mortgage application > Loan required > Loan details

In this section you can confirm details of your client's current loan.

Application AA8207688C1 You are in Application > My applications > Loan details

- Personal
- Property portfolio
- Financial
- Property to be purchased
- Loan required
- Loan details**
- Loan purpose
- Loan breakdown
- Repayment strategy
- Loan deposit details
- Present housing
- Submission form
- Declaration and submit

Loan details

Please note any changes to the Loan or Purchase Price/Valuation could alter the decision you received in AIP

Has the loan or purchase price/valuation changed since the AIP? -

Porting product? - ?

i Before starting an application to port your client's mortgage you'll need to know the existing loan amount, product code and loan term and to avoid delays this information needs to be as accurate as possible.
Your client can get this information by contacting Santander Mortgage Operations on 0800 917 5030. When they call they'll be asked to provide their Mortgage Account Number (shown on Annual Mortgage Statement) and complete an ID&V check.

Porting amount - ?

£ 100000

Mortgage Type - ?

Fixed Rate less than 5 years

Loan breakdown

Purpose	AIP Amount	FMA Amount
Mortgage required *	£ 150,000	£ 150,000
Funds required to improve property *	£ 0	£ 0
Total mortgage required	£ 150,000	£ 150,000
Deposit	£ 150,000	£ 150,000
Purchase price	£ 300,000	£ 300,000



Make sure you select 'Yes' to porting a product. You'll also need to enter the existing loan amount as the 'Porting amount' and confirm the type of product your client currently has.



If your client is moving to a larger property and needs to borrow more than their existing loan, please enter the total mortgage required.

Full mortgage application > Loan required > Loan breakdown

In this section you can enter details for the breakdown of the loan required.

Application AA8207688C1 You are in Application > My applications > Loan breakdown

Loan breakdown

Total amount you wish to borrow
£ 150,000

Porting amount
£ 100,000

Ported loan details

Please ensure that the product code and all loan details are entered correctly to ensure that an accurate kfi is produced. ?

Loan Part 1

Loan Amount * Product *
£ 100,000 KH78R

Repayment Type * Loan Term *
Repayment 25 MM

Total allocated £ 100,000

Loan Parts

Please ensure that the product code and all loan details are entered correctly. ?

To view our latest product information [click here](#)

Loan Part 1

Loan Amount * Product *
£ 50,000

Repayment Type * Loan Term *
Repayment 25 MM

Total allocated £ 50,000

Back Continue



In the 'Ported loan details' section, please enter the current loan amount, product code, repayment type and loan term.



If your client is borrowing more, you'll need to enter the information for this additional amount in the 'Loan parts' section. Please enter the loan amount, repayment type and loan term. You'll also need to search for the product for this new additional loan amount.

Product search

Products will be filtered for **Loyal Mover** Customers with a LTV of 50% requesting a loan amount of £50,000

Product type Product code ME04H

Benefit package Yes No -OR-

Search by type Search by code

Product search

Products will be filtered for **Loyal Mover** Customers with a LTV of 50% requesting a loan amount of £50,000

Sort by: Best Fit First 1

Product Code	Product description	Rate	Product fee	Withdrawn
ME04H	2 year fixed rate, min loan 6K, max loan 1000K	1.74%	£999.00	

Page 1 of 1

Cancel Start again Use selected product

Where to get
more help?

03

Where can you get more help?

Visit our Santander for Intermediaries website > Literature to access our Introducer Internet guides



Speak to your dedicated contact. Enter your Introducer Internet code into the dedicated contact search on our homepage to find their details.



Call our Introducer Internet help desk if you need technical support on 0800 085 1198.



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