

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

1. Introducer Internet > Agreement in principle
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Introducer Internet
> Agreement in
principle

01

Application details

In this section you can enter the details for the application, including the application type and client 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 *

Santander

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'll need to start a new application.

Application details

In this section you can give your client's personal details.

The screenshot shows the 'Applicant details' section of a Santander mortgage application form. On the left is a navigation menu with options: Personal, Applicant 1, Applicant details (highlighted), Contact details, Address details, Property portfolio, Financial, Loan required, Present housing, and Declaration and submit. The main form area contains the following fields and questions:

- Santander Mortgage Account Number, you can find this on your mortgage statement**: Text input field containing 'ANMF12345679'.
- Title**: Dropdown menu with 'Mr' selected.
- First name**: Text input field containing 'Test'.
- Do you have a middle name?**: Radio buttons for 'Yes' and 'No'.
- Surname**: Text input field containing 'Test'.
- Date of birth**: Date picker showing '01 / 02 / 1990'.
- Gender**: Radio buttons for 'Male' and 'Female'.
- Marital status**: Dropdown menu with 'Single' selected.
- Has a previous name, maiden name or alias ever been used?**: Radio buttons for 'Yes' and 'No'.
- Do you have a partner or spouse living with you at your current address?**: Radio buttons for 'Yes' and 'No'.
- Do you have any financial dependents?**: Radio buttons for 'Yes' and 'No'.



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

Loan required > Loan details

Once you've entered the customer's details, you can give details of the loan your client needs.

New Agreement in principle You are in Application > My applications > Loan details

Loan details

Mortgage required * ?

£ 150,000

Purchase price/valuation * ?

£ 300,000

Property usage *

Wholly Owner-Occupied Res. ▾

Porting product? * ?

Yes No

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 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 * ?

Fixed Rate less than 5 years ▾

Does the product have a cashback element? * ?

Yes No

Back Continue

i 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.

As long as you've got your client's consent and can answer some security questions, your dedicated contact can provide you with all this information.

Or your client can call 0800 917 5630. They'll ask them to give their mortgage account number (shown on their annual mortgage statement) and to verify their identity.

! If your client doesn't want to port their product e.g. their product has no early repayment charge, select 'No' to the 'Porting product?' question.

Loan required > Loan purpose

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

The screenshot shows a web interface for a 'New Agreement in principle'. On the left is a navigation menu with items: Personal, Property portfolio, Financial, Loan required, Loan details, **Loan purpose** (highlighted in red), Loan breakdown, Present housing, and Declaration and submit. The main content area shows a breadcrumb trail: 'You are in Application > My applications > Loan purpose'. Below this is the title 'Loan purpose' and a warning box: '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''. A dropdown menu labeled 'Loan purpose *' is set to 'Larger Property'. At the bottom are 'Back' and 'Continue' buttons.

- ⓘ Make sure you select the correct option for the purpose of the loan.
- ⚠ For clients using Shared Ownership, please choose this option using the drop down.

Introducer Internet

- > Full mortgage application

02

Introducer Internet > Full mortgage application

Loan required > Loan details

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

Application AAB207688C1 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? -

Yes No

Porting product? - ?

Yes No

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 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.

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

Back Continue

i 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.

It's important to enter the correct product details or your client could be charged an early repayment charge (ERC).

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

i If your client doesn't want to port their product e.g. their product has no early repayment charge, select 'No' to the 'Porting product?' question.

Loan required > Loan breakdown

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

Application AAB207688C1 You are in Application > My applications > Loan breakdown

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 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 * £ 100,000 Product * KH78R ✓
Repayment Type * Repayment Loan Term * 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 * £ 50,000 Product *
Repayment Type * Repayment Loan Term * 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. It's important to enter the correct product details or your client could be charged an ERC.

 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 top-up 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-

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 1

Product Code	Product description	Rate	Product fee	Withdrawn
ME04H	2 year fixed rate, min loan 6K, max loan 1000K	1.74%	£999.00	<input checked="" type="radio"/>

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Where to get
more help

03

Where to get more help

Contact us



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



Speak to your [dedicated contact](#) so they can help you with your application, making the process easier for you and your client. Enter your Introducer Internet code into the dedicated contact search on our 'Contact us' page to find their details.



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



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