

Account Number

Customer Name

Interest Only Mortgage Repayment Strategy details

Please indicate on the form below the details of your plan to pay off your original loan by the end of your mortgage term. Please fill in as much detail as you can then return to us in the envelope provided. Select which out of the 10 options below apply to you & fill in that section of the form.

1 Endowment	Tick <input type="checkbox"/>	When will you have access to funds? MM YY	Expected amount £	Is your plan on track? Yes <input type="checkbox"/> No <input type="checkbox"/>
2 Pension plan lump sum	Tick <input type="checkbox"/>			
3 Investments	Property <input type="checkbox"/> Stocks & shares <input type="checkbox"/> Other <input type="checkbox"/> Tick <input type="checkbox"/>			

4 Savings	Tick <input type="checkbox"/>	Current balance £	Monthly savings £
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5 Selling your home	Tick <input type="checkbox"/>	Estimated sale date MM YY	Estimated current property value £	6 Remortgaging elsewhere	Tick <input type="checkbox"/>	Estimated remortgage date MM YY	Estimated current property value £
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7 Switching to repayment	Tick <input type="checkbox"/>	When do you plan to switch? MM YY	How much of your mortgage do you plan to switch to repayment? All <input type="checkbox"/> Part <input type="checkbox"/> £ if Part <input type="text"/>	8 Monthly overpayments	Tick <input type="checkbox"/>	<input type="checkbox"/> I currently overpay by £ <input type="text"/>	<input type="checkbox"/> I plan to overpay by £ <input type="text"/>	When do you plan to start? MM YY
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9 Other plan	Tick <input type="checkbox"/>	What is your plan? <input type="text"/>	When will you have access to funds? MM YY	Expected amount £	Is your plan on track? Yes <input type="checkbox"/> No <input type="checkbox"/>
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10 I have no plan in place to repay my mortgage at the end of the term	Tick <input type="checkbox"/>
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Contact details To ensure that our records are up to date, please confirm your phone number.

Telephone No.

Interest Only Review Programme

We have introduced the Interest Only Review Programme, which offers support to help you set up a repayment strategy (or help develop your existing plans) and includes reviews with us at key mortgage milestones in the future.

Finally, we would like to thank you for taking the time to complete this form. Please sign below to confirm that the details captured above accurately reflect the plans you currently have in place to repay your loan by the end of the term. Whilst we have asked for this information to update our records, it is your responsibility to regularly review your plan to ensure it is on track to repay the mortgage balance in full when due.

Signature(s)

Date