



Intermediary Customer Information Request Form

Please complete from and email to Clydesdale.Product.Switch@cybg.com

*In order for us to process this request and give the best possible service, please note your relationship manager's name in the 'Subject Field' of your email and ensure that all details below are completed accurately. Please also ensure that the customer and intermediary declarations are signed and dated.

A. Intermediary Details

Intermediary Name

Intermediary
Company Name

FCA Reference Number

Contact Number

E-mail Address

B. My Customer Details

Customer Name(s)

Sort Code(s)

Account Number(s)

Correspondence Address

Postcode

Property Address
(if different)

Postcode

C. Customer Declaration

I/We agree that you may update the intermediary detailed above with the mortgage information detailed in section E of this form (no other information, other than that detailed in section E, will be provided to the Intermediary as part of this request).

Signature

Signature

Date

Date

D. Intermediary Declaration

I confirm that I have been authorised by the customer(s) above to receive the information detailed in section E. The information will only be used in conjunction with the needs of the customer(s).

I accept responsibility for the security of any information provided to me.

Signed

Date

E. Existing Mortgage Details (for internal use only)

With reference to the above, please see below the requested information.

Date information provided on (and correct on)

Sort Code	Account Number	Balance	Current Interest Rate	Mortgage Maturity Date	Concessionary Rate End Date (if any)	Repayment Type