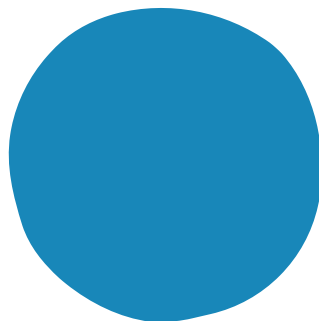




Taking back control and amending products.



Taking back control and amending products:

Important

When you “take back control” of a case, it is removed from our workflow and will return to ‘pre-offer’ status.

Unless the application is fully resubmitted, no further prompts or updates can be provided.

Where changes are being made to the original DIP, a new credit decision will be generated when the application is resubmitted.

Only a soft footprint will be left unless a material change (name, address or date of birth) is made resulting in a registered search being left.

1. Click ‘Take back control of the case’ in the ‘Case summary’ page.

Document	Status
Address Verification (M00000000322127) For Mark Spencer	Requested
Name Verification (M00000000322127) For Mark Spencer	Requested
Latest paylip (M00000000322127) For Mark Spencer	Requested

2. Confirm and check the declaration. Then select the reason for wanting to take back control of the case and click ‘Start’.

If you are looking to change the term or loan amount, please select ‘Update to loan requirements details and you will need to get a new decision.

I confirm that all applicants have consented to the case data being amended on their behalf.

Reason for update

Choosing to take back control of the case will suspend all other activity on the case until you resubmit it. Please note that when you confirm below that you wish to continue to update the case, you will not be able to abort this process; the only way to progress will be to resubmit the application.

Please select the primary reason for updating the application.

Change of products

Enter details of a new security property

Update to loan requirements details

Update to personal details

Update to repayment strategy details

Update to income/expenditure details

Update to employment details

Update to conveyancer details

3. Under Next Steps click ‘Select a Product’. This will take you to the ‘Product Selection’ page which will display the product previously selected.

4. If you want to amend the current product selected click 'Edit', this will allow you to amend the current amounts allocated to the product as well as the term. If you want to amend the term, click 'Term Change'.

If you want to amend the repayment/interest only amount, click 'Repayment Change'. Once you're happy with your amendments click 'Select'.

If you want to select a different product click 'Remove' on the current product selected. Input the details of the loan part and either input the Product code and click 'Search'. If the product is unknown, click 'Search'.

If you require an illustration click 'Generate Illustration'.

Once done select 'Apply'.

The screenshot shows the 'Loan parts (1)' interface. On the left is a 'Summary' sidebar with sections for 'Loan requirements', 'Costs', 'Affordability', and 'Payment route'. The main area displays loan details for '33CJ - 33CJ FIX 3.64% 11/01'. A table lists 'Repayment amount' (£100,000), 'Interest only amount' (£0), and 'Term' (40 year(s) 0 month(s)). 'Edit' and 'Remove' buttons are visible in the top right. At the bottom right, there are 'Generate illustration' and 'Apply' buttons.

5. When Selecting 'Edit' you will be able to change the term and the repayment amount if you are selecting multiple products.

This screenshot shows the 'Loan parts (1)' interface with the 'Edit' button highlighted. The 'Term change' button is highlighted in blue, and the 'Repayment change' button is highlighted in grey. Below these, there are input fields for 'Repayment amount' (£ 100000), 'Year(s)' (40), and 'Month(s)' (0). The 'Select' button is also highlighted in blue.

This screenshot shows the 'Loan parts (1)' interface with the 'Repayment change' button highlighted in grey. The 'Repayment amount' input field is highlighted in red, showing '£ 100000'. The 'Select' button is also highlighted in blue.

6. Click through to the 'Advice, fees and declaration' page, check all information is correct, and when satisfied, click 'Submit Application'. Changes will be saved and transferred to our processing systems.

An application submission can now be made.

- ✓ Applicant contact details
- ✓ Employment details
- ✓ Property address
- ✓ Property details
- ✓ Bank details
- ✓ Conveyancer details
- ✓ Valuation details
- ✓ **Advice, fees & declaration**

Advice, fees & declaration

Advice fee

Level of advice
Advice given

Fee you will charge applicant
£ 0

Valuation & lender fees

Please note that the fees listed below relate to the current version of the application only. TSB Bank plc will contact you to take payment for any outstanding fees or arrange a refund as necessary after the application has been resubmitted.

Valuation type
No Upgrade Required

Lender fees
There are no lender fees to pay for the selected product(s).

Declaration

Please print the [application declaration](#) document and give to each applicant.

- ☐ Please confirm that each applicant has been given a copy of the declaration and agrees to the terms & conditions, and that each applicant has been presented with an illustration for the product(s) they are applying for.
- ☐ Please confirm that you have the applicant(s) permission to proceed to Full Mortgage Application.

[Valuation details](#) [Submit application](#)