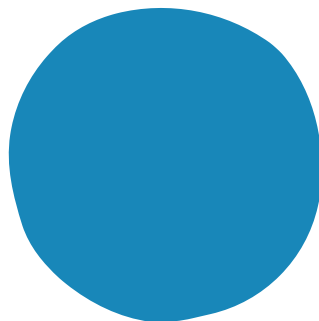




# Taking back control and amending products.



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## Taking back control and amending products:

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

# Case summary

## Next steps

Application has been submitted. To allow the case to progress, we require the following documents.

## Other options

- Take back control of the case to change some details on the application

## Overview

7/19

### Active - Pre Offer

Last activity  
Address Verification Case Requirement has been requested.  
a few seconds ago Case tracking

- New Purchase
- Owner Occupation

## Documents required

Please note there are currently 3 documents that you need to provide in order to progress this case.

Document	Status
Address Verification (MG0000000032221237) For Mark Spencer	Requested
Name Verification (MG0000000032221237) For Mark Spencer	Requested
Latest payroll (MG0000000032221237) For Mark Spencer	Requested
<div>Attach document</div>	

## Case information

- View all case documents
- View case tracking
- View case messages (0 unread)

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.

# Application updates

Declaration

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

Reason for update

Please select the primary reason for updating the application

☒ Change of product

☐ 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

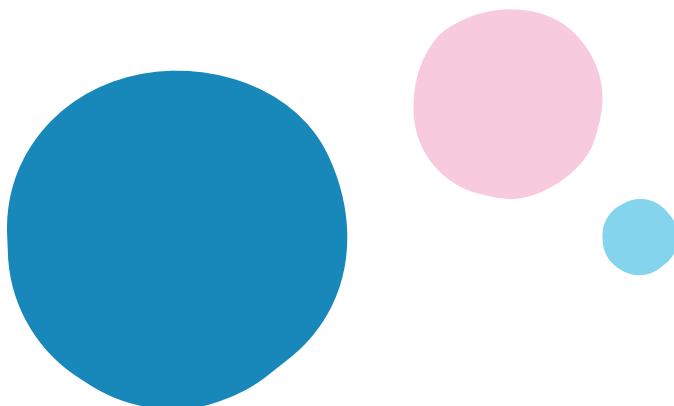
☐ Update to employment details

☐ Update to conveyancer details

Cancel

Start

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'.

**Summary**

**Loan requirements**

Repayment  
£100,000  
Interest only  
£0  
Preferred term  
40 year(s) 0 month(s)

**Costs**

Initial monthly payment  
£394.63  
The total amount to be repaid by the end of the term including loan amount, interest and fees.  
Total amount payable  
£209,478.15

**Affordability**

Calculations are based on current OPR  
Maximum borrowing  
£325,000  
Minimum term  
4 year(s) 0 month(s)

**Payment route**

Test Route [Edit](#)

**Loan parts (1)**

33CJ - 33CJ PR 3.64% 11/21 [Edit](#) [Remove](#)

Repayment amount  
£100,000  
Interest only amount  
£0  
Term  
40 year(s) 0 month(s)

[More information on this product](#)

[Generate illustration](#) [Apply](#)

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

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Test Route [Edit](#)

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Repayment amount  
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Interest only amount  
£0  
Term  
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[More information on this product](#)

[Generate illustration](#) [Apply](#)

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

TSB15210 (07/23)