

You are allowed to link up to three offset savings accounts to your offset mortgage account. All the offset savings account holders must also be a party to the mortgage application.

Please provide details below of the offset savings account(s) that you intend to open and we will send you application form(s) for signature with your Mortgage Offer.

Unless you advise us otherwise, any cashback relevant to your mortgage product will be paid into the offset savings account held in the joint names of all parties to the mortgage or, where this is not applicable, the offset savings account of the main holder of the offset mortgage account.

OFFSET SAVINGS ACCOUNT 1

	Main Holder	Other Holder (if applicable)
Title (Mr, Mrs, etc.)		
Surname		
Forename(s)		

OPTIONAL ADDITIONAL SAVINGS ACCOUNTS (if required)

OFFSET SAVINGS ACCOUNT 2

	Main Holder	Other Holder (if applicable)
Title (Mr, Mrs, etc.)		
Surname		
Forename(s)		

OFFSET SAVINGS ACCOUNT 3

	Main Holder	Other Holder (if applicable)
Title (Mr, Mrs, etc.)		
Surname		
Forename(s)		

YOUR PAYMENT AMOUNT

With an offset account, you have two options for calculating your payment amount. Please tick a box to indicate which of the following payment options you require:

Gross Payment

You can opt to pay on a gross basis and your payment will be based on your mortgage balance only. This allows any offset savings balances to work harder by reducing the outstanding mortgage balance faster.

Net Payment

Based on an estimated initial savings balance of £

If you decide to pay on a net basis, your payment will be based on the combined balance of your mortgage and savings account(s). You must estimate (above) the amount that you will pay into your savings accounts(s) within 30 days of the completion of your mortgage. Your net payment will initially be based on this estimate.

HAVE YOU REMEMBERED TO INCLUDE THE CORRECT IDENTIFICATION? (Please Tick)

You must include:

ONE of the following forms of Primary ID: Current UK or EU passport (certified copy), Current UK or EU driving licence with photograph full or provisional (certified copy), Blue Disabled Driver's Pass.

If you are unable to provide one form of Primary ID, you must provide TWO forms of secondary ID: Current UK or EU driving licence showing current address (non-photograph version), HMRC tax notification (tax assessment, statement or account or notice of coding; not P45 or P60).

One form of proof of address: A Local Authority Council Tax bill (valid for current year).

For details of other forms of accepted identification contact our call centre on 0113 225 7777.