

Freestyle® Lifetime Mortgage Checklist



This is a lifetime mortgage.

To understand the features and risks, ask for a personal illustration.

Before phoning us you must have:

Your Standard Life Freestyle Lifetime Mortgage agency code

Confirmation your client has given permission for the fraud prevention search and understands the implication of this Yes No

To Approval in Principle Stage

This checklist is for reference only and should NOT be sent to Standard Life Bank. If you have any queries, please call us on 0845 609 0254

Client details:

APPLICANT 1

Surname

Forename

Middle names

Title

Date of birth DD / MM / YYYY
(minimum age of younger applicant is 60)

Address

Postcode

Time at current address

Home telephone number

Mobile telephone number (if applicable)

Business telephone number (if applicable)

(Must have at least one landline)

Preferred contact details

Is client resident in the UK? Yes No
(client must be resident in the UK to proceed)

APPLICANT 2

Surname

Forename

Middle names

Title

Date of birth DD / MM / YYYY
(minimum age of younger applicant is 60)

Address

Postcode

Time at current address

Home telephone number

Mobile telephone number (if applicable)

Business telephone number (if applicable)

(Must have at least one landline)

Preferred contact details

Is client resident in the UK? Yes No
(client must be resident in the UK to proceed)

Freestyle Lifetime Mortgage details:

Does your client require:

- Pure Equity Release Yes No
(no outstanding loans on the property)
- Remortgage Yes No
(property has outstanding loans)
- House purchase Yes No

Estimated property value (minimum £50,002)

Initial loan requirements (minimum £25,001)

Pensions
Mortgages
Savings
Investments
Healthcare
Insurance

Speak soon.

For more information on anything in this leaflet or if there is anything more about Standard Life we can help you with, please visit our website or call the numbers below.

www.standardlife.com/adviser

Applications 0845 609 0254

Sales Support Team 0131 246 0090

For customers with hearing or speech difficulties – please call our Textphone facility direct on 0845 601 2346.

For a copy of this information in Braille, large print or audio format, please call 0845 845 8450.

Standard Life Bank plc, registered in Scotland (SC173685), Standard Life House,
30 Lothian Road, Edinburgh EH1 2DH, authorised and regulated by the Financial Services Authority.
Calls are recorded/monitored. Calls from BT landlines will cost a maximum of 5p per minute. The price of calls from other networks may vary.
www.standardlife.co.uk
© Standard Life Bank 2008

SLBLTCH 0408

