



ROME Enhancements

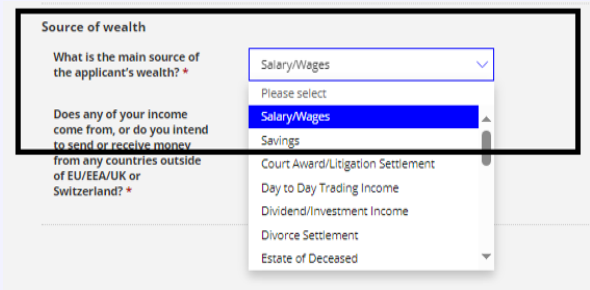
We have made some minor enhancements to our ROME system effective today 20th January.

To support enhancements to our KYC process, a number of application fields will be amended.

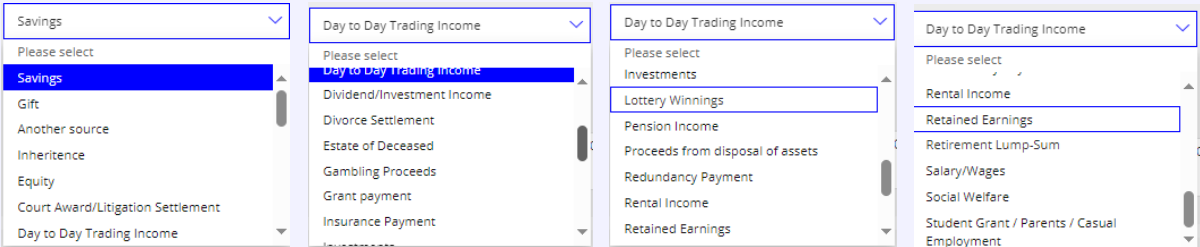
Details of these changes are listed with accompanying screenshots below and on page 2:

- 1. The question ‘Which source(s) have contributed to your wealth’ is changing from a tick box list to a dropdown option. **Note:** Only one dropdown option can be selected. If more than one option applies, please select the one most appropriate in the dropdown. (see screenshot below)

Source of wealth

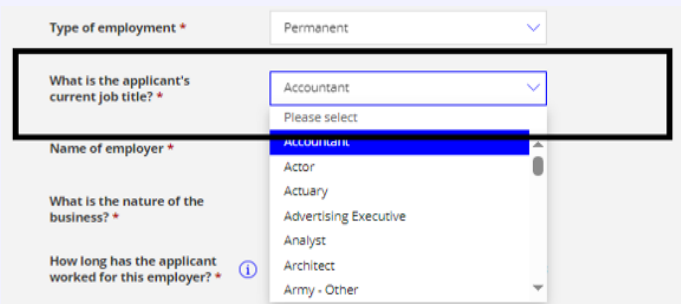


- 2. The ‘Funding the mortgage’ section will be amended to include additional options. **Reminder:** It is important to ensure the correct sources are documented within this section.



- 3. ‘What is the applicant’s current job title’ field will change from a free text box to dropdown options. If the customers occupation does not appear on the list, please choose the most appropriate or the ‘other’ option. (see screenshot below)

Applicant’s current job title

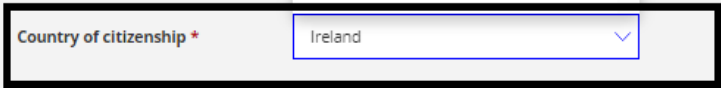




ROME Enhancements

4. A new ‘Country of Citizenship’ field will be included, answer must be selected from dropdown options (see screenshot below)

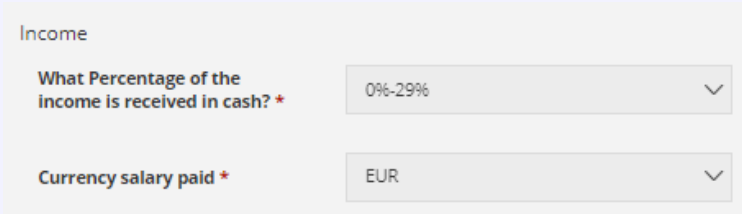
Country of citizenship



Country of citizenship \* Ireland

5. There will be a new ‘What percentage of the income is received in cash’ field which must be selected from dropdown options 0%-29%, 30%-49%, 50%-100%. It is important that this option matches the actual value of cash (if any) your applicant(s) receive as part of their income (see screenshot below)

Income – what percentage of income is received in cash



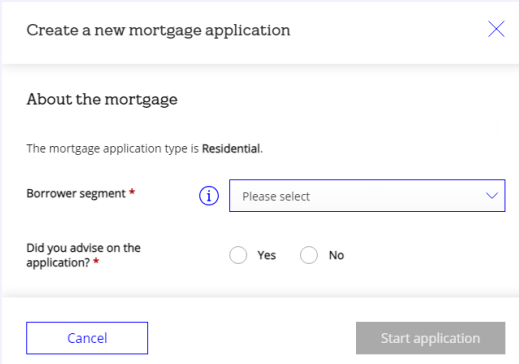
Income

What Percentage of the income is received in cash? \* 0%-29%

Currency salary paid \* EUR

6. Borrower Segment. To allow for a smoother application journey, when creating a new case, you will need to ensure the correct ‘Borrower Segment’ is selected i.e. first-time buyer, mover, switcher, switcher w/equity release. It will no longer be possible to change the ‘Borrower Segment’ after a case has been created. Should you need to change the ‘Borrower Segment’ after the case is created, the ‘Copy Case’ functionality must be used to create a new case.

Borrower segment



Create a new mortgage application

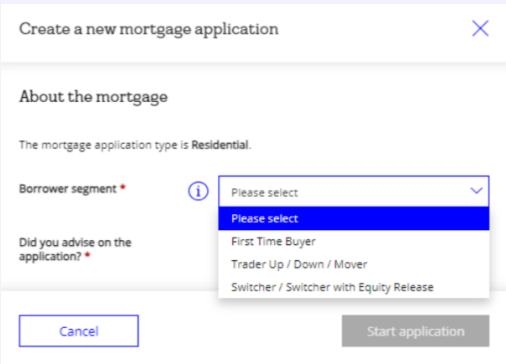
About the mortgage

The mortgage application type is Residential.

Borrower segment \* Please select

Did you advise on the application? \* ☐ Yes ☐ No

Cancel Start application



Create a new mortgage application

About the mortgage

The mortgage application type is Residential.

Borrower segment \* Please select

Did you advise on the application? \* ☐ Yes ☐ No

First Time Buyer  
Trader Up / Down / Mover  
Switcher / Switcher with Equity Release

Cancel Start application