



Valuer's Panel, Updated documents on Broker Website, Process reminders

Valuer's Panel

Updated Valuer's Panel on Broker Website

We have updated our Valuer's Panel on our Broker Website. These updates include the **removal of some valuers** from the panel.

As always please **refer to the current Valuer's Panel** when selecting a Valuer for your customer's applications.

Updated documents on Broker website

Listing of recently updated documents

We have recently updated some of our documentation to reflect our new head office and its registered office address.

The following is a list of the documents that been updated and added to our Broker Website. Please ensure to delete any locally saved copies and access the most recent versions:

- BPFI - Confirmation of Mortgage Pack
- Data Privacy Notice
- Data Privacy Summary
- Information Distance Marketing Directive
- Intermediary Application Form
- Terms of Business
- General Conditions Booklet
- Deed of Assignment of Life Policy
- Guarantee Indemnity Individual
- Notice of Interest in Fire Policy

BER Cert – Second hand property

Reminder to submit BER Cert upfront for mover applications

A reminder that on Second Time Buyer/Mover applications, the BER certificate must be provided **up front** in the application process.

Please refer to February Broker News for guidance on our updated BER process.

Broker Specialist phone line

Security verification process

Applications can only be discussed with authorised brokers i.e. brokers that work in the firm that the application originated from.

Any brokers that wish to speak to the Broker Specialist team about a case must be fully registered on our ROME system with a profile in your own name.

When phoning in to the Broker Specialist team, the following security questions will be asked:

1. Broker's full name
2. Broker firm's CBOI (Central Bank of Ireland) reference number
3. Name of Brokerage

If you are not currently registered with a profile on ROME and wish to get set up, please do not hesitate to contact your broker Relationship Manager who will guide you through the steps.

Broker Document Checklist form

Correct completion of form

In order for us to accept this form on first receipt, please ensure correct completion according to following guidelines:

- Non-resident/Dual resident lending question on page 2 **must be selected** Yes/No. PLEASE DO NOT LEAVE BLANK
- Where answer selected is **No** (i.e. none of the applicants are non-res/dual-res), please **skip the sub-question and leave it blank** as below and proceed straight to question about **First Home Shared Equity Scheme**:

Additional information that is needed for your application

► **Non-resident/Dual resident Lending** Yes ☐ No ☒

Are any or all of the applicants non-resident/dual-resident?
If yes, please see below. If no, proceed to next question.

Please tick to confirm: Yes ☐ No ☐

I/we confirm that the borrower has approached our office by their own volition and no financial advice was given while abroad, that there is no marketing campaigns or direct advertising outside of ROI relating to cross border lending.

► **Are the applicants availing of the First Home Shared Equity Scheme**

No ☒ Yes ☐ (Please select one)
If yes, please see below. If no, proceed to next question.

Please tick to confirm:

If yes, Share Equity Scheme approval cert will need to be provided. ☐

► **Is the customer availing of the 'Affordable Housing scheme**

No ☒ Yes ☐ (Please select one)
If yes, please see below. If no, proceed to next question.

Please tick to confirm:

If yes, Affordable Housing Approval Confirmation to be provided. ☐

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