

It's all about you

Quality advice starts here

We have been providing financial advice since 1999. We arrange mortgages from the 'whole of market' and this means we can find you the right mortgage from over 70 lenders offering more than 7000 mortgages.

Not forgetting the importance of protecting you

Arranging the mortgage is one part of our service. When you take out a mortgage, you agree to make regular monthly repayments throughout its term. But, what if you are unable to make repayments due to a redundancy, being unable to work, becoming critically ill or even dying? Listening to our protection advice may stop your home from being repossessed.

Getting to know you

In order to recommend the best mortgage and protection products, we need to understand your personal circumstances. We will do this by asking you some questions that enable us to build up a picture of your current financial situation. Along the way, we will find out what is important about your needs so that we can recommend a product which is right for you.

Strictly Confidential

Naturally, everything we discuss is entirely confidential. We only share your personal information with those required in order to perform our duties and your wishes. For example, arranging a mortgage requires us to share your information with a mortgage lender or, if you are buying a shared ownership property, we will share your information with the housing association that you are buying through as they will need to assess your financial information too.

Data Security

The security of your data is really important to us. All of your personal information is stored securely and backed up in a secure area, all in accordance with latest legislation.

Protecting your identity

It's our job to protect people from mortgage fraud, if someone was to use your identity to apply for a mortgage we would be able to prevent this by performing a series of checks. Likewise, we may perform certain checks on you, and where we do not meet you in person this may also include the verifying your identity using a credit agency.

Your personal information rights

When it comes to your personal information, we put you first. You have a number of rights that you can exercise at any time. You can learn more about these rights by requesting a copy of our privacy policy or by viewing it online at financeplanning.co.uk/privacy-policy.

Keeping in touch

Your mortgage may have an initial period where the payments are less than the lender's standard variable rate. When this initial period ends, the lender is likely to increase your payments unless we find you another product. Obviously, we do not want this to happen. As such you can take comfort in knowing that once the initial period is up, we will make sure that you are offered the best available alternative at that time.

Also, after arranging your mortgage, we may make you aware of anything we feel you will have an interest in which typically involves your home, your mortgage or your personal finances. You can update your privacy settings at any time by unsubscribing to the emails or by visiting our website.

I understand how my personal information will be used by the Finance Planning Group and have been given access to its privacy policy in order to understand and exercise my rights should I wish to.

SIGNED DATE

NAME

SIGNED DATE

NAME