

## GUIDE TO COMPLETING A FURTHER ADVANCE, TRANSFER OF EQUITY, TERM CHANGE OR PORT

Whether your customer would like to borrow more money, port their mortgage, change their term, add or remove a borrower from their loan, all you need to do is follow these five simple steps.



Email [pcvenquiries@metrobank.plc.uk](mailto:pcvenquiries@metrobank.plc.uk) with the following information along with full details of your customer's requirements:

- Customer Surname
- Customer Date of Birth
- Metro Bank Mortgage Account Number (**please note this starts with a 4 and must be requested from your customer**)
- Postcode of property mortgaged with Metro Bank



One of our colleagues will call you back within 24 hours, discuss the case in more detail to ensure it fits our lending criteria and talk you through the next steps.



Once all the details have then been agreed on the phone, please [login to our mortgage portal](#) and input an agreement in principle (AIP). Please ensure you select the appropriate product and move the case to 'AIP Illustration Produced' status.



Once the case has been keyed, please email [pcvenquiries@metrobank.plc.uk](mailto:pcvenquiries@metrobank.plc.uk) with the case reference number in the subject line confirming an AIP has been completed. Once your Mortgage Illustration is ready, we will add it on to the case for you.



Once your customer is happy with the Mortgage Illustration, [login to our mortgage portal](#) and submit the application for our underwriters to assess.