

This is a commercial mortgage transaction and we recommend that you take independent advice from your solicitor and accountant regarding all aspects of the existing loan(s).

If this form is not fully completed and/or the information requested within it has not been provided, we will not be able to consider your request until such time that all information is made available. Please return a signed scan copy of the alteration form together with all supporting documents being provided in one email.

## 1. PRACTICE DETAILS

Practice name	<input type="text"/>
Practice address	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
	Postcode
Contact number	<input type="text"/>

Please confirm each practicing GP's working hours at the surgery together with the full time equivalent number of GPs at the surgery. This information helps us to understand the allocation of profits within the practice accounts and whether the practice is in line with the national average for GP to patient ratios.

### Type of rent reimbursement

Cost rent  Notional rent  Amount £  Date of next review  /  /

Type of contract  GMS  Standard PMS  APMS  Other

### Cost rent

If you are in receipt of cost rent reimbursement we will require a copy of the most recent district valuer's report confirming the amount of cost rent your practice currently receives together with the current market rent equivalent. In addition, please ensure that you discuss any proposed changes requested within this form with your rent reimbursement provider as any changes to your existing finance may impact on the cost rent the practice receives.

Cost rent reimbursement evidence enclosed

### Notional rent

Please provide a copy of the latest letter from your rent reimbursement provider detailing the current level of notional rent reimbursement the practice receives together with the date of your next review. We use these figures to calculate a desktop valuation of the property and to determine the affordability of the mortgage portfolio.

Notional rent reimbursement evidence enclosed

### Practice accounts

Please provide full certified copies of your practice accounts for the last three years, signed by either the partners or the practice accountant. Your accounts help us to determine the strength of your business.

Copy of practice accounts enclosed

## 2. SECURITY DETAILS

Please confirm the address(es) of the security property(ies):-

If any part of the property(ies) is occupied as a residence please provide details below:-

## 2. SECURITY DETAILS (CONTINUED)

If part of the property(ies) is let please provide details below:-

Tenant	Term Remaining (in years)	Rental Income
<input type="text"/>	<input type="text"/>	£ <input type="text"/>
<input type="text"/>	<input type="text"/>	£ <input type="text"/>
<input type="text"/>	<input type="text"/>	£ <input type="text"/>

### Registered charges

If another lender(s) has taken the above property(ies) as security in favour of any other lending please provide their contact details below:-

Name: <input type="text"/>	Address: <input type="text"/>
Name: <input type="text"/>	Address: <input type="text"/>

### Valuation Report

Please provide a copy of the most recent report that you hold. Please note that we may require a valuation report to be carried out by a member of our panel. I will advise you further in this matter upon receipt of the requested information. Please note that the fee payable will be your responsibility.

Copy of valuation report enclosed

I/We acknowledge that we will be responsible for payment of the valuation fee

## 3. RELEASE AND/OR INCORPORATION OF BORROWERS/GUARANTORS/PROPERTY OWNERS

Please complete this section to advise us of the parties who are to be incorporated and/or released from your existing mortgage(s).

### Release

Please confirm the name(s), indicating in each case whether they are to be released as a borrower, guarantor and/or property owner and the mortgage number(s) they are to be released from:-

Please tick which applies

Name	Mortgage Number(s)	Borrower	Guarantor	Property owner
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Incorporation

Please confirm the name(s), indicating in each case whether they are to be incorporated as a borrower, guarantor and/or property owner and the mortgage number(s) they are to be incorporated into:-

Please tick which applies

Name	Mortgage Number(s)	Borrower	Guarantor	Property owner
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Property owners

Please confirm the full names of those you wish to register at the land registry as property owners following completion of the transaction:-

1 <input type="text"/>
2 <input type="text"/>
3 <input type="text"/>
4 <input type="text"/>

Please note that under English law a maximum of four doctors can be registered as the property owners. If there is insufficient space above to detail the required alterations please print/copy an additional page.

#### 4. POINTS OF CONTACT

We may be required to contact the following parties when dealing with your application. Please complete their full details:-

<b>Practice Manager</b>		<b>Accountant</b>	
Title	<input type="text"/>	Title	<input type="text"/>
Name	<input type="text"/>	Name	<input type="text"/>
Company name/ address	<input type="text"/>	Company name/ address	<input type="text"/>
Post code	<input type="text"/>	Post code	<input type="text"/>
Contact number	<input type="text"/>	Contact number	<input type="text"/>
Email address	<input type="text"/>	Email address	<input type="text"/>
<b>Practice solicitor</b>		<b>Financial advisor</b>	
Title	<input type="text"/>	Title	<input type="text"/>
Name	<input type="text"/>	Name	<input type="text"/>
Company name/ address	<input type="text"/>	Company name/ address	<input type="text"/>
Post code	<input type="text"/>	Post code	<input type="text"/>
Contact number	<input type="text"/>	Contact number	<input type="text"/>
Email address	<input type="text"/>	Email address	<input type="text"/>

Please note that you will need to instruct a solicitor to deal with the legal formalities required for this transaction. If the proposal is approved, we will forward our instructions to our solicitors (TLT LLP). TLT will then liaise with your solicitors to proceed with and complete the legal formalities. Please note that you will be responsible for all costs incurred by your solicitor and by our solicitor. Our solicitor's costs will be finalised once the proposal is approved and we have provided them with instructions. Details of the costs will be provided to your solicitor as part of their initial contact. Your solicitor will be required to provide a costs undertaking to TLT in order that they can progress the transaction.

#### 5. PERSONAL DETAILS – PLEASE COMPLETE FOR ALL EXISTING AND NEW PARTIES

Please complete this section for all existing and proposed borrowers/guarantors/property owners even if unaffected by the proposed alterations.

<input type="checkbox"/> Borrower	<input type="checkbox"/> Guarantor	<input type="checkbox"/> Property owner	<input type="checkbox"/> Borrower	<input type="checkbox"/> Guarantor	<input type="checkbox"/> Property owner
First Name	<input type="text"/>		First Name	<input type="text"/>	
Middle Name	<input type="text"/>		Middle Name	<input type="text"/>	
Surname	<input type="text"/>		Surname	<input type="text"/>	
Maiden/married name	<input type="text"/>		Maiden/married name	<input type="text"/>	
	<input type="checkbox"/> Male	<input type="checkbox"/> Female		<input type="checkbox"/> Male	<input type="checkbox"/> Female
Date of Birth	<input type="text"/>		Date of Birth	<input type="text"/>	
Residential address	<input type="text"/>		Residential address	<input type="text"/>	
Post code	<input type="text"/>		Post code	<input type="text"/>	
Duration at address*	<input type="text"/> Years	<input type="text"/> Months	Duration at address*	<input type="text"/> Years	<input type="text"/> Months
Contact number	<input type="text"/>		Contact number	<input type="text"/>	
Email address	<input type="text"/>		Email address	<input type="text"/>	

\*If you have been at your current address for less than three months please provide details of your previous address.

By providing your email address you understand that we may contact you regarding your loan(s) via email and understand that emails are not secure and are potentially visible to others.

**5. PERSONAL DETAILS – PLEASE COMPLETE FOR ALL EXISTING AND NEW PARTIES (CONTINUED)**

Please complete this section for all existing and proposed borrowers/guarantors/property owners even if unaffected by the proposed alterations.

<input type="checkbox"/> Borrower	<input type="checkbox"/> Guarantor	<input type="checkbox"/> Property owner	<input type="checkbox"/> Borrower	<input type="checkbox"/> Guarantor	<input type="checkbox"/> Property owner
First Name			First Name		
Middle Name			Middle Name		
Surname			Surname		
Maiden/married name			Maiden/married name		
	<input type="checkbox"/> Male	<input type="checkbox"/> Female		<input type="checkbox"/> Male	<input type="checkbox"/> Female
Date of Birth			Date of Birth		
Residential address			Residential address		
Post code			Post code		
Duration at address*	<input type="text"/> Years	<input type="text"/> Months	Duration at address*	<input type="text"/> Years	<input type="text"/> Months
Contact number			Contact number		
Email address			Email address		

<input type="checkbox"/> Borrower	<input type="checkbox"/> Guarantor	<input type="checkbox"/> Property owner	<input type="checkbox"/> Borrower	<input type="checkbox"/> Guarantor	<input type="checkbox"/> Property owner
First Name			First Name		
Middle Name			Middle Name		
Surname			Surname		
Maiden/married name			Maiden/married name		
	<input type="checkbox"/> Male	<input type="checkbox"/> Female		<input type="checkbox"/> Male	<input type="checkbox"/> Female
Date of Birth			Date of Birth		
Residential address			Residential address		
Post code			Post code		
Duration at address*	<input type="text"/> Years	<input type="text"/> Months	Duration at address*	<input type="text"/> Years	<input type="text"/> Months
Contact number			Contact number		
Email address			Email address		

<input type="checkbox"/> Borrower	<input type="checkbox"/> Guarantor	<input type="checkbox"/> Property owner	<input type="checkbox"/> Borrower	<input type="checkbox"/> Guarantor	<input type="checkbox"/> Property owner
First Name			First Name		
Middle Name			Middle Name		
Surname			Surname		
Maiden/married name			Maiden/married name		
	<input type="checkbox"/> Male	<input type="checkbox"/> Female		<input type="checkbox"/> Male	<input type="checkbox"/> Female
Date of Birth			Date of Birth		
Residential address			Residential address		
Post code			Post code		
Duration at address*	<input type="text"/> Years	<input type="text"/> Months	Duration at address*	<input type="text"/> Years	<input type="text"/> Months
Contact number			Contact number		
Email address			Email address		

\*If you have been at your current address for less than three months please provide details of your previous address.

By providing your email address you understand that we may contact you regarding your loan(s) via email and understand that emails are not secure and are potentially visible to others. If there is insufficient spaces above please print/copy an additional page.

## 6. DECLARATION

I/We declare that the information given is true and accurate to the best of my/our knowledge.

I/We agree to inform the lender of any future changes in the partnership including any proposed lettings, building works and CQC report outcomes which could impact the surgery.

I/We undertake to be responsible for all valuation and legal fees, together with any other reasonable costs and disbursements incurred on behalf of the lender whether or not the alteration proceeds.

I/We agree that the payment of any valuation or fee shall not in any way bind the lender to agree to any alterations.

I/We understand that the surveyor's report is not a structural survey and, if a structural survey is required, it must be obtained independently at my/our expense.

I/We agree that the surveyor's report is confidential to the lender.

I/We understand that emails are not secure and are potentially visible to others.

I/We understand that the granting of an alteration implies no warranty as to the construction or condition of the property or that the purchase price is reasonable.

### Signature(s) – all those parties which have completed Section 5

Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>

### Signature(s) of property owner(s) – as proposed in section 3

Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>
Name	<input type="text"/>	Signature	<input type="text"/>	Date	<input type="text"/> / <input type="text"/> / <input type="text"/>

## 7. DATA PROTECTION

### Personal Information

We collect and use personal information about you so that we can provide you with your loan. This notice explains the most important aspects of how we use your information but you can get more information about the terms we use and view our full privacy policy at [www.avivainvestors.com](http://www.avivainvestors.com) or request a copy by writing to us at the address stated in the "Contacting us" section below.

The data controller(s) responsible for this personal information is Aviva Public Private Finance Limited.

### Personal information we collect and how we use it

We will use your personal information:

- To set up and administer your loan,
- To support legitimate interests that we have as a business: we need this to detect and prevent fraud and to help us better understand our customers and improve our customer engagement (this includes marketing),
- To meet any applicable legal or regulatory obligations: we need this to meet compliance requirements with our regulators (e.g. Financial Conduct Authority), to comply with law enforcement and to manage legal claims; and
- To carry out other activities that are in the public interest: for example we may need to use personal information to carry out anti-money laundering checks.

We may also use personal information about other people. This may include individuals who are authorised to act on your behalf, for example, an attorney or individuals who work for or otherwise represent you. **If you are providing information about another person we expect you to ensure that they know you are doing so and are content with their information being provided to us. You might find it helpful to show them this privacy notice and if they have any concerns please contact us in one of the ways described below.**

The personal information we collect and use will include name, address, date of birth and financial information.

Of course, you don't have to provide us with any personal information, but if you don't provide the information we may not be able to proceed with setting up your loan.

Some of the information we collect as part of this application will be provided to us by third parties and this can include information already held about you within the Aviva Group, information we obtain from publicly available records, our trusted third parties and from industry databases, including fraud prevention agencies and databases.

We do not currently make any decisions based on automatic decision making using your personal information to decide whether we can proceed with your request. If in the future we need to make decisions based on automatic decision making, we will inform you about this.

#### **How we share your personal information with others**

We may share your personal information:

- With the Aviva Group, our agents and third parties who provide services to us to help us administer our products and services;
- With regulatory bodies and law enforcement bodies, including the police, e.g. if we are required to do so to comply with a relevant legal or regulatory obligation;
- With other organisations including public bodies and the police (either directly or using shared databases) for fraud prevention and detection purposes;

Some of the organisations we share information with directly or indirectly may be located outside of the European Economic Area ("EEA"). We'll always take steps to ensure that any transfer of information outside of Europe is carefully managed to protect your privacy rights. For more information on this please see our privacy policy or contact us.

#### **How long we keep your personal information for**

We maintain a retention policy to ensure we only keep personal information for as long as we reasonably need it for the purposes explained in this notice. We need to keep information for the period necessary to administer your loan and deal with any queries. We may also need to keep information after our relationship with you has ended, for example to ensure we have an accurate record in the event of any complaints or challenges, carry out relevant fraud checks, or where we are required to do so for legal, regulatory or tax purposes.

#### **Your rights**

You have various rights in relation to your personal information, including the right to request access to your personal information, correct any mistakes on our records, erase or restrict records where they are no longer required, object to use of personal information where this use is based on our legitimate business interests. For more details in relation to your rights, including how to exercise them, please see our full privacy policy or contact us.

#### **Contacting us**

If you have any questions about how we use personal information, or if you want to exercise your rights stated above, please contact our Data Protection Officer by writing to them at The Data Privacy Office, Aviva Investors (Floor 6), St Helen's, 1 Undershaft, London EC3P 3DQ.

If you have a complaint or concern about how we use your personal information, please contact us in the first instance and we will attempt to resolve the issue as soon as possible. You also have the right to lodge a complaint with the Information Commissioner's Office at any time.

#### **Marketing - How we keep you informed**

The Aviva Group and its agents may use personal information we hold about you across the Aviva Group to help us identify and tailor products and services that may be of interest to you and would like to contact you from time to time to provide you with updates and offers for Aviva's products and services tailored to you by direct marketing by post, phone, email or text. We may continue to do this after your loan has ended.

To tell us if you would prefer not to hear about Aviva products and services please contact us at Aviva, Freepost, Mailing Exclusion Team, Unit 5, Wanlip Road Ind Est, Syston, Leicester, LE7 1PD.

#### **Anti-Money Laundering**

In accordance with EU and UK legislation in relation to the prevention of money laundering we are obliged to verify the identity and address of all parties (i.e. borrower's, property owners and guarantors) who are entering into a mortgage contract with us.

#### **Contact us:**

Phone: 01603 686328\*

Website: [www.avivainvestors.com/gpfinance](http://www.avivainvestors.com/gpfinance)

Email: [gpfinance@avivainvestors.com](mailto:gpfinance@avivainvestors.com)

Post: GP Finance, PO Box 21, Surrey Street, Norwich, NR1 3NJ, DX 84904 Norwich (3).

\*Calls may be recorded for training and monitoring purposes, and to comply with applicable law and regulations.



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Registered in England No 2334210. Both of which have the registered office St. Helen's, 1 Undershaft, London EC3P 3DQ

J17939-CI03019 02/2019