



# Pure Heritage

## Cash Release Application Form

This form is an application for using your Drawdown facility. To avoid delay in processing your application please complete all sections and sign as appropriate.

**Please use the pre-paid envelope to return your completed form to us.**

POAs: If you have Power of Attorney and you are completing the application on behalf of the customer, please fill in all parts of the application form as normal and sign the declaration in section 4, ticking the box to confirm this is a Power of Attorney application.

If you are unsure of the financial implications of using your cash facility, please contact your financial adviser.

Ref No.

(For office use only)

## 1. Personal details

How much would you like to drawdown?  
Min £500 of remaining facility.

£

	First Applicant	Second Applicant (if applicable)
Title/Forename(s)	<input type="text"/>	<input type="text"/>
Surname	<input type="text"/>	<input type="text"/>
Home address (to which correspondence will be sent)	<input type="text"/> Postcode	<input type="text"/> Postcode
Date of birth	<input type="text"/>	<input type="text"/>
Contact telephone number	<input type="text"/>	<input type="text"/>

Your Drawdown is a feature of your lifetime mortgage. You should refer to your original lifetime mortgage offer document for confirmation of the Drawdown facility agreed at that time.

You will receive a Drawdown Offer document which outlines the details of your requested Drawdown. Please read this document carefully and sign and date as appropriate if you wish to proceed.

Purpose of funds

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

## 2. Bank account details

Please complete the details of the bank account you wish the monies to be transferred into.

Name of account holder(s)\*

Name of bank

Sort code  Account No.

\*If your lifetime mortgage is in joint names and you wish the monies to be transferred to a sole account, please could the applicant who is not receiving the Drawdown funds into their bank account sign the declaration below.

I authorise that the Drawdown funds should be paid into the above bank account.

Signed

Print name  Date

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## 3. Using your personal information

Personal information which you provide to Pure Retirement will be used to pursue our legitimate interest and in the following ways:

- To set up and administer your Lifetime Mortgage
- To calculate the amount you can borrow
- For complaints analysis (if appropriate)
- For research and statistical analysis
- For fraud prevention
- To share with our funder, Just Retirement Money Limited (please see their privacy policy at [www.pureretirement.co.uk/external/just/privacy-policy](http://www.pureretirement.co.uk/external/just/privacy-policy))
- For regular reporting to the FCA (Financial Conduct Authority)

To complete our processes and administer your plan, we may have to share your information with our service providers and credit reference agencies. These organisations will not use your information for any other purpose. We may also need to share information with your financial adviser and solicitor.

To apply for a lifetime mortgage with Pure Retirement Limited, it is a requirement for you to provide the personal data requested. If this data is not provided we will not be able to process the application.

We may transfer or otherwise dispose of the benefit of the proposed loan to any person without further reference to you. By signing the declaration you will be consenting for us to dispose of any loan should we so wish. Pure Retirement may disclose information relating to you, the property, the loan and the conduct of the loan account to any transferee or potential transferees of the loan.

To complete our processes we may have to share your information with other third parties. This information will not be used for any other purpose. We will not disclose any of your information to any other body or organisation except to prevent fraud or if required to do so by law.

Your information will only be used when necessary and will only be available to those who need to see it. When you sign the declaration on page 4 of this form you will be consenting for us to use any sensitive information for the purposes above.

We will keep your personal data for 12 years after the redemption of the mortgage contract if your application proceeds to completion in order to fulfil our regulatory requirements. If your application does not proceed to completion we will keep your data for 6 years for regulatory purposes.

You have the right to access all of your personal data that we store and to apply to rectify or object to the processing of your personal data. Requests can be made in writing to, The Data Protection Officer, Pure Retirement Limited, 2200 Century Way, Thorpe Park, Leeds LS15 8ZB. There will be no charge for accessing your data.

You have the right to complain about the way we use or process your data to the Information Commissioner's Office on 0303 123 113 or through their website [www.ico.org.uk](http://www.ico.org.uk)

If you need any further information, please contact the **Pure Retirement Data Protection Officer** on **0844 854 2120** or email [info@pureretirement.co.uk](mailto:info@pureretirement.co.uk). Alternatively you may contact us in writing at **Pure Retirement Ltd, 2200 Century Way, Thorpe Park, Leeds, LS15 8ZB.**

#### 4. Customer's declaration and authorisation

**By signing this declaration I/we agree that:**

This Drawdown will be administered on an interest roll-up basis in accordance with the terms of the Mortgage, the Lifetime Mortgage Conditions and the terms and conditions of the Offer of Loan.

I/we will inform Pure Retirement if any of the information contained in this application changes before the Drawdown is advanced.

I/we will keep the property fully insured until the loan is fully repaid.

I/we will not let the property without prior authorisation from Pure Retirement.

Any person interested now or in the future in the loan, the mortgage and other security may rely upon the truth and accuracy of the information contained in this application and any supporting documentation, information or security.

**I/we give Pure Retirement permission:**

To use the information I/We gave as detailed in the section headed 'Using your personal information'.

To pass the information to third parties for the prevention of detection of fraud, enabling assets to be rightfully claimed or where required by law or regulation.

To transfer or otherwise dispose of the benefit of the proposed loan, mortgage or other security for the loan if it so wishes, to any person(s) with reference to myself, and I acknowledge that all references to 'the lender' will include any such transferee.

To make searches at credit reference agencies who will supply credit information and information from the electoral register. The agencies will record details of the search whether or not the application proceeds.

**I/we declare that:**

I/we am/are over 55 years of age.

I/we are resident in the United Kingdom.

To the best of my/our knowledge and belief, the information on this application and any previous statements and particulars I/we have submitted to Pure Retirement are true and complete.

I/we have read the notice regarding the use of my/our personal information.

	First Applicant	Second Applicant (if applicable)
Signature(s)	<input type="text"/>	<input type="text"/>
Date(s) signed	<input type="text"/>	<input type="text"/>
Power of Attorney application?	<input type="checkbox"/> Yes <input type="checkbox"/> No If 'Yes' please enclose a copy of the Power of Attorney.	

A copy of the lifetime mortgage conditions and your completed application form are available on request.

Pure Retirement Limited, 2200 Century Way,  
Thorpe Park, Leeds, LS15 8ZB  
**Tel: 0113 366 0599 Email: [info@pureretirement.co.uk](mailto:info@pureretirement.co.uk)**  
**[www.pureretirement.co.uk](http://www.pureretirement.co.uk)**