



The Stafford

For Intermediaries



The Stafford
IntermediariesHub

User Guide



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1. Online Registration

1.a

In order to register online select the following hyperlink:

<https://intermediaries.srbs.co.uk/>

Then select **'Sign up now'** and then enter your email address and click **'Send verification code'**

The screenshot shows two side-by-side mobile app screens. The left screen is titled 'Sign Up' and asks 'Used MV Loans Origination before?' with the text 'You can sign in to your existing account used with another institution!'. Below this is a 'User Details' section with an email input field containing 'mortgages@srbs.co.uk' and a 'Send verification code' button. The right screen is titled 'Start your loans journey' and asks 'Used MV Loans Origination before?' with the text 'You can sign in to your existing account used with another institution!'. It has input fields for 'Email Address' and 'Password', a 'Forgot your password?' link, a 'Sign in' button, and a 'Don't have an account? Sign up now' link. At the bottom right of the right screen is the 'Powered by Mutual Vision' logo.

1.b

A verification code will be forwarded to the email address you have entered.

The screenshot shows a mobile app screen titled 'Verify your email address'. It has a blue header with the title. Below the header, it says 'Thanks for verifying your mortgages@srbs.co.uk account!'. Underneath, it displays 'Your code is: 249252'. At the bottom, it says 'Sincerely, Loans Origination'.

1.c

Enter the code into the **'Verification Code'** box and click on **'Verify Code'**.

The screenshot shows the 'Sign Up' screen from step 1.a, but now with the verification code entered. The email input field contains 'mutual@srbs.co.uk' and the verification code input field contains '771947'. There are two buttons at the bottom: 'Verify code' and 'Send new code'.



1.d

Once your code is verified, please enter a password and click **'Create'**.

< Cancel

Sign Up

Used MV Loans Origination before?
You can sign in to your existing account used with another institution!

User Details

E-mail address verified. You can now continue.

Change e-mail

Create

1.e

You will then be required to authenticate this email address again by clicking on **'Send verification code'**. You will then receive another code to your registered email address.

Cancel

Two-Factor Authentication

User Details

Verification is necessary. Please click Send button.

Send verification code

Continue




1.f

Please enter the received code and click **'Verify code'**.

Cancel

Two-Factor Authentication User Details

Verification code has been sent to your inbox.
Please copy it to the input box below.


1.g

Your E-mail address should be verified and you can click **'Continue'** (update with new image)

Cancel

Two-Factor Authentication User Details

E-mail address verified. You can now continue.





1.h

You will then need to **'Create an account'**. Please enter your details and click **'Continue'**.

The Stafford For Intermediaries

Create an account

Personal Details

Title
Mr

First Name
Anon

Surname
Test

Job Title
Business Development Manager

Mobile Number
0000000000

Please select your marketing preferences

By Phone

By Email

By Post

Continue

1.i

Click on **'Postcode lookup'** to find the address or you can enter this manually.

Company Details

Are you regulated by the FCA?

Yes No

FCA Number
15698236

Organisation Name
SRBS Mortgages

Trading As Name
The Stafford Mortgages

Use Postcode lookup

Property name
Property Name

Property number

Post code
st16 2jh Find

Select address
Please select

Please select an address from the list

Enter address manually



1.j

You can then choose your **'Mortgage Club'** and **'Mortgage Network'** you are associated with. You can enter more than one mortgage club

Mortgage Club

Legal & General x The Mortgage Alliance x Simply Biz x | x v

Mortgage Network

Primis v

Continue

1.k

You will then be able to check the details you have entered. You can edit any details if required. Click **'Register'** you are now registered and are able to start inputting a **'New Case'**.

Create an account

Personal Details v

Company Details v

Summary ^

Personal Details	Company Details
Mr Anon Test	15698236
Business Development Manager	The Stafford Mortgages
0000000000	4
	MARKET SQUARE STAFFORD
	ST16 2JH
Edit	Edit

Register

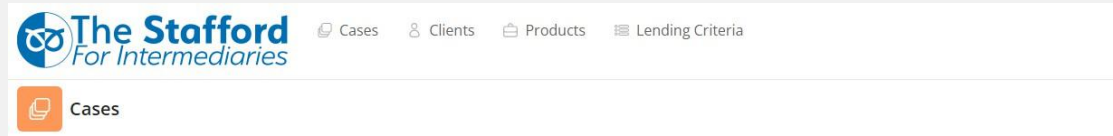
Cancel



2. Creating a Client

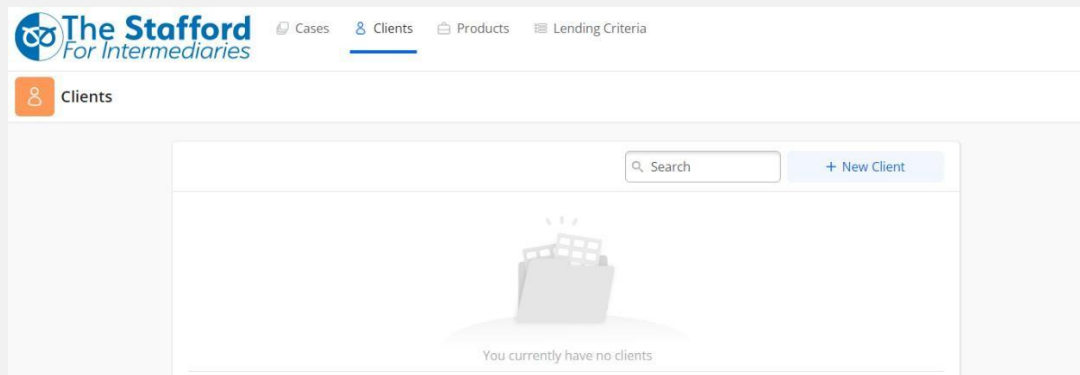
2.a

Once logged in, the first page you will see is **'Your cases'**. This will display a list of your current and previous cases. In order to create a new client select **'Clients'**.



2.b

You will then be taken to the clients details screen. To add a new client click on **'+ New Client'**.



2.c

Enter all relevant details and then select **'Add client'**.

Add a new client

Title
Please select

First name

Last name

Date of birth
DD MM YYYY

Post code
Find

Enter address manually

Email address

Contact number

Add client Cancel



2.d

When all the details have been entered you have now set up your client

The Stafford For Intermediaries Cases Clients Products Lending Criteria

Clients

Search + New Client

Title	First name	Last name	Date of birth	Email	Telephone	
Mr	Anew	Test	01/01/2001	xxxx.xxxx@srbis.co.uk	0111111111111111	Edit

VC

AT Applicant
Anew Test

STAFFORD RAILWAY BLDG SOC , 4, MARKET SQUARE, STAFFORD,
STAFFORDSHIRE, ST16 2JH

Documents

No Documents

+ Add document

Remove client

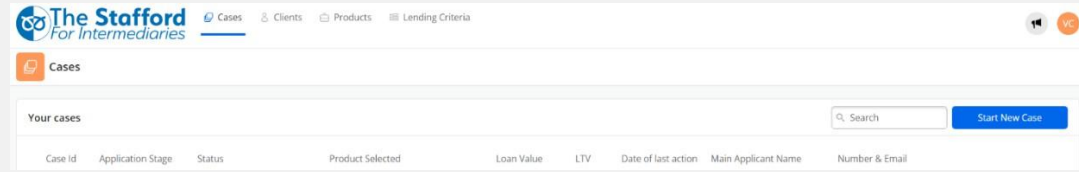




Submitting a DIP

3.a

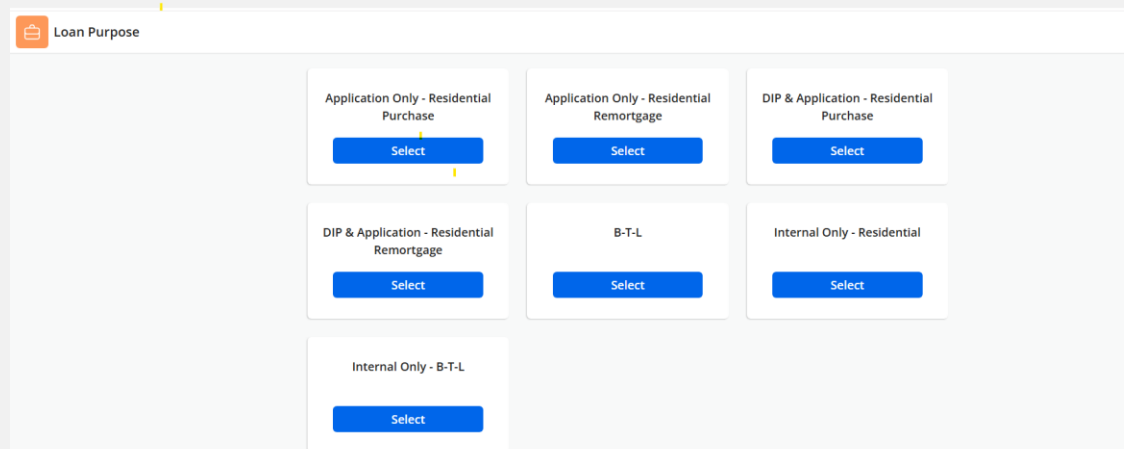
Once the client has been created, you can then create a DIP or move straight to Application. In order to create a DIP select **'Start New Case'**.



3.b

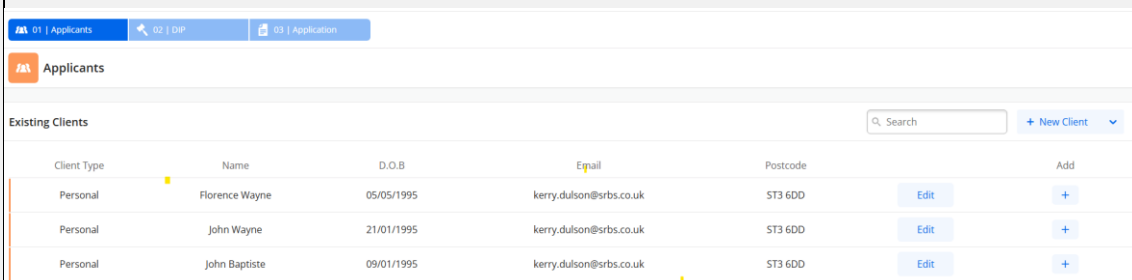
You will then need to select the loan purpose. Please choose from the DIP & Application loan purposes.

Please note we do not currently offer an online DIP for BTL cases. Please email Brokers@srbs.co.uk to obtain a DIP for a BTL.



3.c

You will then see a list of your clients **'Existing Clients'**. To select the client you would like to add to the DIP click on **add '+'**.





3.d If the DIP is joint, you can add more clients using the add button. A maximum of 4 clients can be added.

First name	Last name	D.O.B	Email	Postcode	Add
Anon	Test	01/01/2001	xxxx.xxxx@srbs.co.uk	ST16 2JH	Edit +
Anew	Test	01/01/2001	xxxx.xxxx@srbs.co.uk	ST16 2JH	Edit +

3.e After clicking **'Add'** this will move the client into **'Selected Clients'**. You can also choose who will be the main applicant if you are completing a joint application.

You will then need to **'select a submission route'** for the application. This will be the mortgage club/network that you are affiliated with and click continue.

First name	Last name	Main applicant	Remove
Anon	Test	<input checked="" type="radio"/>	
Anew	Test	<input type="radio"/>	

Select a submission route Continue >



3.f

Complete each section of the DIP form using the navigation buttons at the bottom of each page.

Fees

Your Submission

County
STAFFORDSHIRE

Post Code
ST16 2JH

When did the applicant start living at this address?
DD MM YYYY

Residential Status

Has the applicant lived at this address for less than 3 years?

Does this complete a full 3 years address history?

1.1 Applicant Details

2.1 Financial Dependant(s)

3.g

Or you can click on the left side navigation bar to a section you require.

01 | Applicants

02 | DIP

03 | Application

04 | Complete

DIP

1.1 Applicant Details

Florence Wayne (Main Applicant)

Is the applicant an existing customer?

Is applicant a first time buyer?

Title
Mrs

Forenames
Florence

Surname
Wayne

Marital Status
Please select

Relationship to other applicants if applicable?

1.2 Address Details

3.h

In order to submit the DIP all sections including subsections must have been completed, this is shown by the 'green tick'.

01 | Applicants

02 | DIP

03 | Application

04 | Complete

DIP

1: Personal Information

2: Family & Employment Details

3: Commitments & Expenditure

4: Property & Loan Details

5: Declaration & Submission

Your Submission

Confirm your submission?

You are about to submit this stage of the process. Please take a moment to review the details you have entered before progressing.

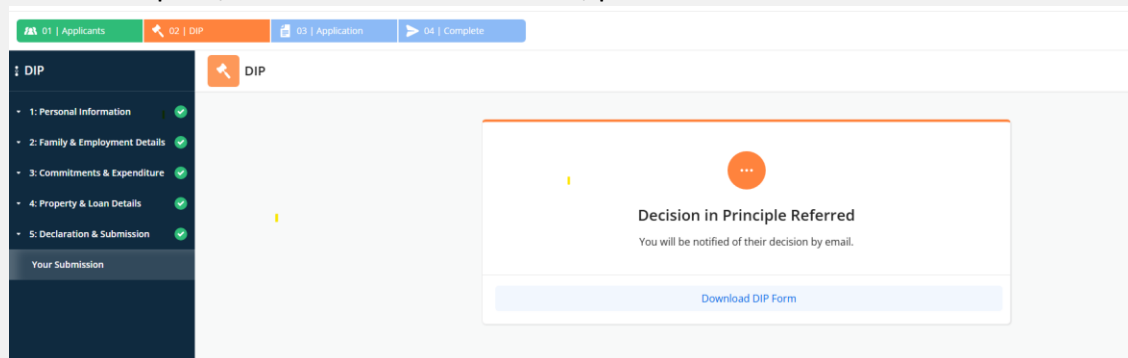
Submit DIP



3.i Once all mandatory questions have been completed you can then select **‘Submit DIP’**.

Note: If this is your first submission, you will be unable to use the ‘Submit DIP’ button until the Society has fully registered your firm. You will receive a separate email confirming you can submit applications from the Society when all the appropriate checks have been completed.

In order to print/download the DIP as a PDF, please click on **‘Download DIP Form’**.





4.Submitting an Application (No DIP previously submitted)

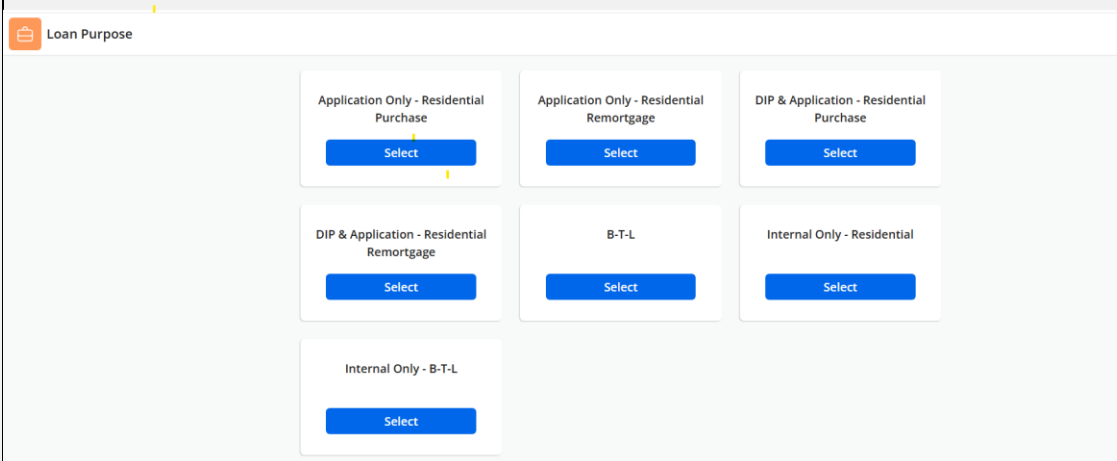
4.a

Once the client has been created, you can then create the application. In order to do this you need to select **'Start New Case'**.



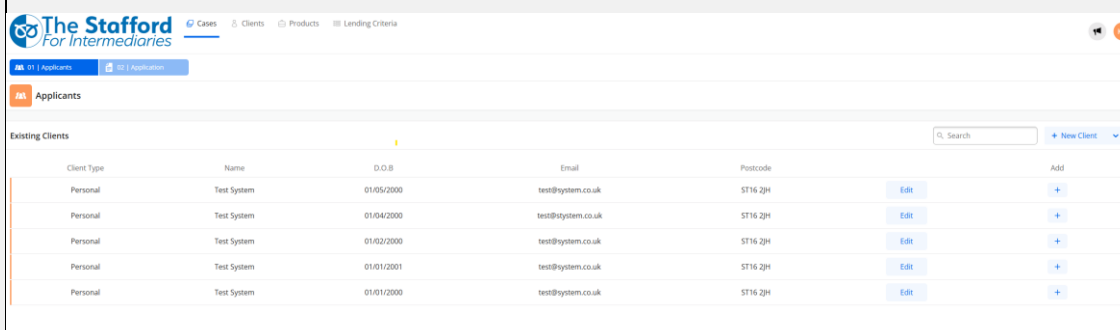
4.b

In the 'Loan Purpose Screen' you will then need to select the correct loan purpose. You can select either Application Only -Residential Purchase, Application Only-Residential Remortgage or BTL. **Please go to section 5 if you have already submitted a DIP as the process is different.**



4.c

You will then see a list of your 'Existing Clients'. To select the client you would like to add to the application click on the **'+'** sign next to their name under the **Add** column.





4.d You can repeat this step to add up to a maximum of 4 clients.

The screenshot shows the 'Applicants' page in the system. At the top, there is a navigation bar with 'The Stafford For Intermediaries' logo and menu items: 'Cases', 'Clients', 'Products', and 'Lending Criteria'. Below the navigation, there are tabs for 'Applicants' and 'Application'. The main content area is titled 'Applicants' and features a search bar and a '+ New Client' button. Below this is a table of 'Existing Clients' with the following columns: Client Type, Name, D.O.B, Email, Postcode, and Add. The table contains five rows of test data.

Client Type	Name	D.O.B	Email	Postcode	Add
Personal	Test System	01/05/2000	test@system.co.uk	ST16 2JH	Edit +
Personal	Test System	01/04/2000	test@system.co.uk	ST16 2JH	Edit +
Personal	Test System	01/02/2000	test@system.co.uk	ST16 2JH	Edit +
Personal	Test System	01/01/2001	test@system.co.uk	ST16 2JH	Edit +
Personal	Test System	01/01/2000	test@system.co.uk	ST16 2JH	Edit +

4.e After clicking 'Add' this will move the client into 'Selected Clients'. You can also choose who will be the main applicant if you are completing a joint application.

You will then need to click the dropdown menu in the bottom righthand corner to 'select a submission route' for the application. This will be the mortgage club/network that you are affiliated with. Once selected you can then click the continue button.

The screenshot shows the 'Selected Clients' page. It features a table with columns: Client Type, Name, Main applicant, and Remove. The first row is selected, and the 'Main applicant' column has a radio button that is checked. The 'Remove' column has a minus sign icon. At the bottom right, there is a dropdown menu labeled 'Select a submission route' and a 'Continue' button.

Client Type	Name	Main applicant	Remove
Personal	Test System	<input checked="" type="radio"/>	⊖
Personal	Test System	<input type="radio"/>	⊖

4.f Complete each section of the application form using the navigation buttons at the bottom of each page.

The screenshot shows a section of the application form. On the left, there is a dark sidebar with 'Fees' and 'Your Submission' labels. The main form area contains the following fields and questions:

- County: STAFFORDSHIRE
- Post Code: ST16 2JH
- When did the applicant start living at this address? (DD, MM, YYYY)
- Residential Status: Own Outright, Own Mortgaged, Rent, Live With Parents, Council Property, Other
- Has the applicant lived at this address for less than 3 years? (Yes, No)
- Does this complete a full 3 years address history? (Yes, No)

At the bottom, there are navigation buttons: '1.1 Applicant Details' and '2.1 Financial Dependent(s)'.



4.g Or you can click on the left side navigation bar to a section you require.

The screenshot shows the '2.1 Financial Dependents' section of the application form. The left navigation bar is expanded to show sections 1 through 4. The main content area displays a question: 'Does the applicant have any financial dependents?' with 'Yes' and 'No' radio buttons. A 'New Test (Main Applicant)' button is also present.

4.h In order to submit your application all sections including subsections must have been completed 'green tick'.

The screenshot shows the 'Confirm your submission?' dialog box. The left navigation bar shows all sections 1 through 6 with green ticks indicating completion. The main content area displays the 'Confirm your submission?' dialog box with a 'Submit Application' button.

4.i Once all mandatory questions have been completed you can then select 'Submit Application'.

Note: If this is your first submission, you will be unable to use the 'Submit Application' button until the Society has fully registered your firm. You will receive a separate email confirming you can submit applications from the Society when all the appropriate checks have been completed.

In order to print/download the application as a PDF, please click on 'Download Application Form'.

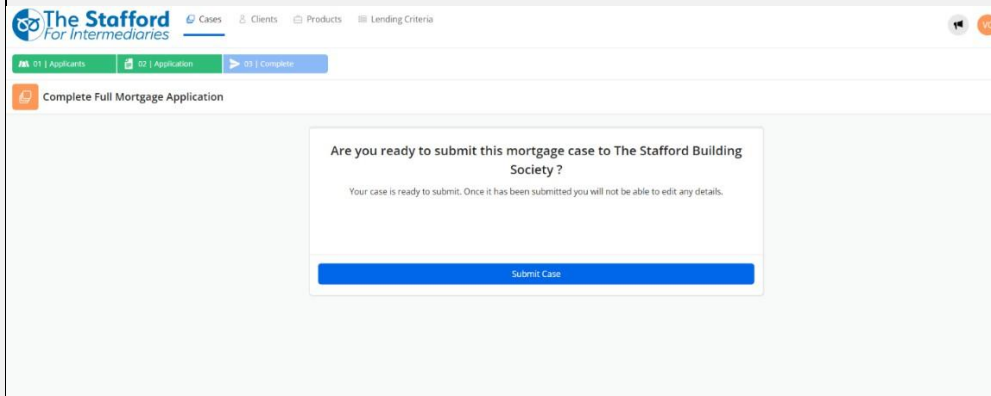
Then click on 'Complete Full Mortgage Application'.

The screenshot shows the 'Stage 2 of 3 complete' confirmation message. The left navigation bar shows all sections 1 through 6 with green ticks. The main content area displays the 'Stage 2 of 3 complete' message with a 'Download Application Form' button and a 'Complete Full Mortgage Application' button.



4.j

Once you are ready to submit your application you will be presented with the below screen. Please be aware that you will be unable to make any changes to your application after you click **'Submit Case'**.





5. Creating an Application (DIP previously submitted)

5.a

Once your DIP has been approved and you are ready to submit the application click 'Cases'. You can then click the 'Continue' button next to the case.

Case ID	Broker Name	Application Stage	Status	Product Selected	Loan Value	LTV	Date of last action	Main Applicant Name	Number & Email	Actions
5768	Laura Lawton	DIP	Active	-	0.00	-	16/04/2026	Kieran Moore	a@a.com	Continue View
5767	Kerry Dulson	Applicant	Active	-	0.00	-	16/04/2026	Test System	test@system.co.uk	Continue View
5766	Laura Lawton	DIP	Active	DR60 - RESIDENTIAL 2 YEAR 0.15% DISCOUNT 80% LTV	200,000.00	50	16/04/2026	Ella Henderson	e@a.com	Continue View

5.b

Complete each section of the application form using the navigation buttons at the bottom of each page. Matching questions already completed on the DIP form will pull through to the application. You can edit this information if required.

1.1 Applicant Details

Test System (Main Applicant)

Is the applicant an existing customer?
 Yes No

Is applicant a first time buyer?
 Yes No

Title
Dr

Forenames
Test

Surname
System

Marital Status
Single

Relationship to other applicants if applicable?

[View DIP](#) [1.2 Address Details](#)

5.c

Or you can click on the left side navigation bar to a section you require.

1.1 Applicant Details

Test System (Main Applicant)

Is the applicant an existing customer?
 Yes No

Is applicant a first time buyer?
 Yes No

Title
Dr

Forenames
Test

Surname
System

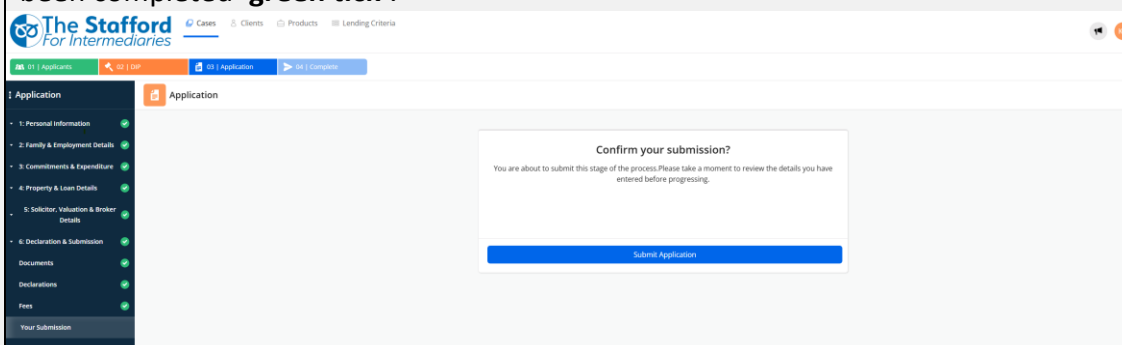
Marital Status
Single

Relationship to other applicants if applicable?

[View DIP](#) [1.2 Address Details](#)



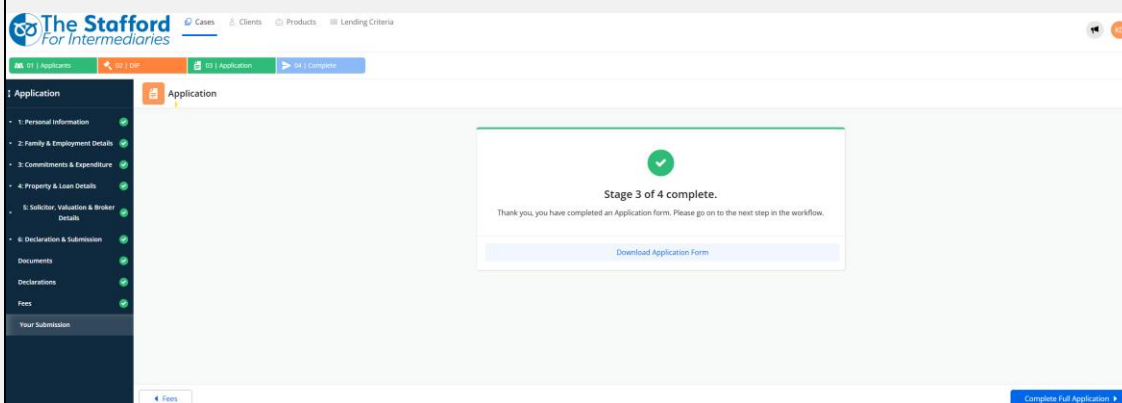
5.d In order to submit your application all sections including subsections must have been completed **'green tick'**.



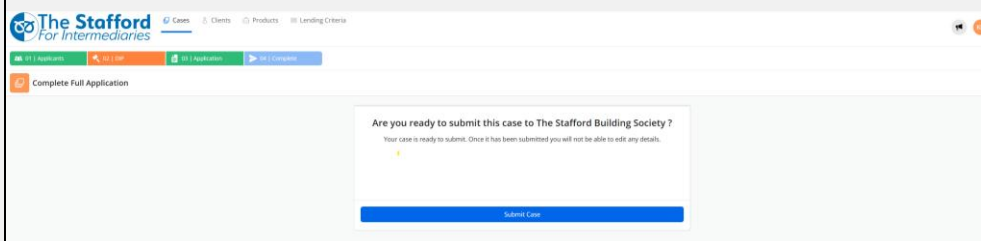
5.e Once all mandatory questions have been completed you can then select **'Submit Application'**.

Note: If this is your first submission, you will be unable to use the 'Submit Application' button until the Society has fully registered your firm. You will receive a separate email confirming you can submit applications from the Society when all the appropriate checks have been completed.

In order to print/download the application as a PDF, please click on **'Download Application Form'**. Then click on **'Complete Full Mortgage Application'**.



5.f Once you are ready to submit your application you will be presented with the below screen. Please be aware that you will be unable to make any changes to your application after you click **'Submit Case'**.





6. Accessing a Partially Completed DIP or Application

6.a

Any application or DIP that has been partially completed will be saved at the point of moving to the next section of the application. Once you receive a **green tick** next to a section this is then automatically saved. You will only receive a green tick on a section once all the mandatory questions have been completed.

The screenshot shows the '1.2 Address Details' section of the application form. The sidebar on the left indicates that '1.1 Applicant Details' is completed with a green tick. The main form area contains the following fields:

- Anew Test (Main Applicant)**
- Present Address**
- Use Postcode lookup**
- Property name**: STAFFORD RAILWAY BLDG SOC
- Property number**: 4

6.b

You can navigate out of the application and back to the main page by clicking on **'The Stafford for Intermediaries'** logo at anytime.

This screenshot is identical to the one in 6.a, showing the '1.2 Address Details' section of the application form. The sidebar on the left indicates that '1.1 Applicant Details' is completed with a green tick. The main form area contains the following fields:

- Anew Test (Main Applicant)**
- Present Address**
- Use Postcode lookup**
- Property name**: STAFFORD RAILWAY BLDG SOC
- Property number**: 4

6.c

You can access a partially completed application by simply selecting **'continue'** next to the case you wish to complete.

The screenshot shows the 'Cases' page with a table of cases. The table has the following columns: Case Id, Application Stage, Status, Product Selected, Loan Value, LTV, Date of last action, Main Applicant Name, and Number & Email. A 'Continue' button is visible next to the case with Case Id 3982.

Case Id	Application Stage	Status	Product Selected	Loan Value	LTV	Date of last action	Main Applicant Name	Number & Email
3982	Application	Active		0.00	0	23/04/2024	Anew Test	xxxx.xxxx@srbcs.co.uk



7. Case Updates

- 7.a As the application is processed by the Society you will be updated on how the case is progressing via the **'Case Tracking Screen'**. This screen can be accessed by clicking on **'Cases'** and then clicking on **'View'** against the case you wish to view.

Case id	Application Stage	Status	Product Selected	Loan Value	LTV	Date of last action	Main Applicant Name	Number & Email		
3985	Applicant	Action		0.00	0	24/04/2024	Anon Test	xxxx.xxxx@srbs.co.uk	Continue	View
3984	Applicant	Action		0.00	0	24/04/2024	Anon Test	xxxx.xxxx@srbs.co.uk	Continue	View
3983	Applicant	Action		0.00	0	24/04/2024	Anon Test	xxxx.xxxx@srbs.co.uk	Continue	View
3982	Application	Submitted	DR48 - RESIDENTIAL 0.46% 2 YEAR DISCOUNT 80% LTV	250,000.00	50	29/04/2024	Anew Test	xxxx.xxxx@srbs.co.uk		View
3981	Applicant	Cancelled		0.00	0	23/04/2024	Anon Test	xxxx.xxxx@srbs.co.uk		View





8. Uploading Documents

- 8.a** You can upload supporting documentation whilst completing the application in the **'Documents'** section or you can upload documents once you have submitted the application from the **'Case Tracking'** screen. The file must be either a jpg/png/pdf file type and be less than 4MB in size.

Documents Section - You can click on **'Upload File'** and this will then ask to upload a file from your computer.

The screenshot displays the 'The Stafford For Intermediaries' web application. The top navigation bar includes 'Cases', 'Clients', 'Products', and 'Lending Criteria'. The main interface is divided into two sections: 'Application' and 'Documents'. The 'Documents' section is active, showing a 'Documents Required' table with columns for 'Category', 'Document Name', and 'Delete'. Below the table is an 'Upload File' button. A modal window is open, titled 'File to upload', with a 'Choose file' button and a message: 'Please select a file of type jpg/png/pdf with a file size less than 4MB'. The modal also contains a 'Category' dropdown menu, a 'File Description' text input field, and 'Cancel' and 'Upload' buttons.



8.b Click on **'Choose file'** this will take you to your files on your computer. Choose a file you wish to attach to the application and double click this will then insert the file name and then you can choose a **'Category'** from the drop down selection. Add a **'File Description'** for the file and click on **'Upload'**.

The screenshot shows a file upload form with the following fields and buttons:

- File to upload: Intermediaries.png
- Category:
- File Description:
- Buttons: and

The screenshot shows the 'Documents' section of the application. It includes a 'Documents Required' heading and a table of uploaded documents.

Documents Required

Please upload supporting documentation:

Anew Test : Main Applicant

Category	Document Name	Delete
Passport	Passport of applicant A	<input type="button" value="X"/> <input type="button" value="View"/>

8.c **Case Tracking Section** – You can add documents to your submitted case whilst the case completes. To do this click on **'Add Document'**.

The screenshot shows the 'Case Tracking' section of the application. It includes a navigation bar, a case summary, and a table of case tracking details.

The Stafford For Intermediaries

Cases Clients Products Lending Criteria

Case 3986 Completed
Anon Test - STAFFORD RAILWAY BLDG SOC , 4, MARKET SQUARE, STAFFORD, STAFFORDSHIRE, ST16 2JH

Applicants

Main Applicant: Anon Test
xxxxx.xxx@srbis.co.uk
000000000000
Passport

Case Tracking

Application	Registration	Offers	Completion
Form	Status	Submission Date	Download
Application	Completed	29/04/2024	<input type="button" value="Download"/>

Loan Details

Details

Organisation:	Stafford Railway Building Society
Address:	STAFFORD RAILWAY BLDG SOC , 4, MARKET SQUARE, STAFFORD, STAFFORDSHIRE, ST16 2JH
Purchase Price:	£ 200,000.00
Loan Amount:	£ 100,000.00
Mortgage Term:	25
Product Code:	DR48 - RESIDENTIAL 0.46% 2 YEAR DISCOUNT 80% LTV
Purpose of Loan:	Residential

Notes

Type note...



9. Sending and Receiving a Note

- 9.a You can send and receive notes to and from the Society. You can type a note to the society in the **'Case Tracking'** section.

Form	Status	Submission Date	Download
Application	Completed	29/04/2024	Download

Details	
Organisations:	Stafford Railway Building Society
Address:	STAFFORD RAILWAY BLDG SOC, 4, MARKET SQUARE, STAFFORD, STAFFORDSHIRE, ST16 2JH
Purchase Price:	£ 200,000.00
Loan Amount:	£ 100,000.00
Mortgage Term:	25
Product Code:	DR48 - RESIDENTIAL 0.46% 2 YEAR DISCOUNT 80% LTV
Purpose of Loan:	Residential

- 9.b The Society will also send notes to you. You will receive an automated email to your registered email address asking you to log in to the portal to view the note. The note can be viewed in the **'Case Tracking'** section.

The Stafford Building Society
Test note received from The Stafford Building Society
07 May 2024 11:33



10. Online Registration – Following the forgotten password process

10.a Click on 'Forgot your password?'

Start your loans journey

Used MV Loans Origination before?
You can sign in to your existing account used with another institution!

Email Address

Password

[Forgot your password?](#)

Sign in

Don't have an account? [Sign up now](#)

Powered by Mutual Vision

10.b Enter your email address and click 'Send verification code'

< Cancel

Reset your password

Email Address

Send verification code

Continue

Powered by Mutual Vision

10.c You will then be sent a verification code to the email address entered

Verify your email address

Thanks for verifying your vicki3550@sky.com account!

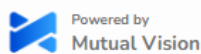
Your code is: 640397

Sincerely,
Loans Origination



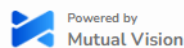
10.d

Please enter this code in the box provided and click on 'Verify code'



10.e

This now confirms you have 'Reset your password' You now need to log into the system by clicking on 'Continue'



10.f

This now requires you to log into the platform the using your new details. Re type in your email address and click 'Send verification code'.

< Cancel

Two-Factor Authentication

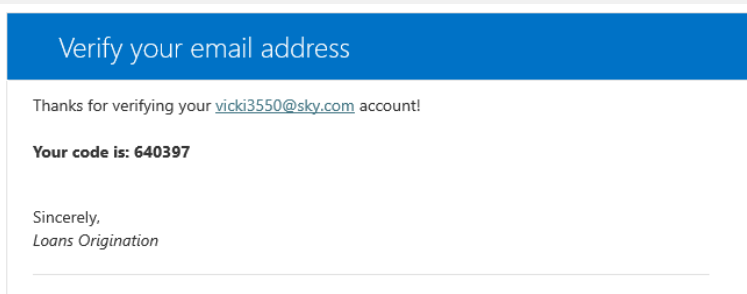
Verification is necessary. Please click Send button.





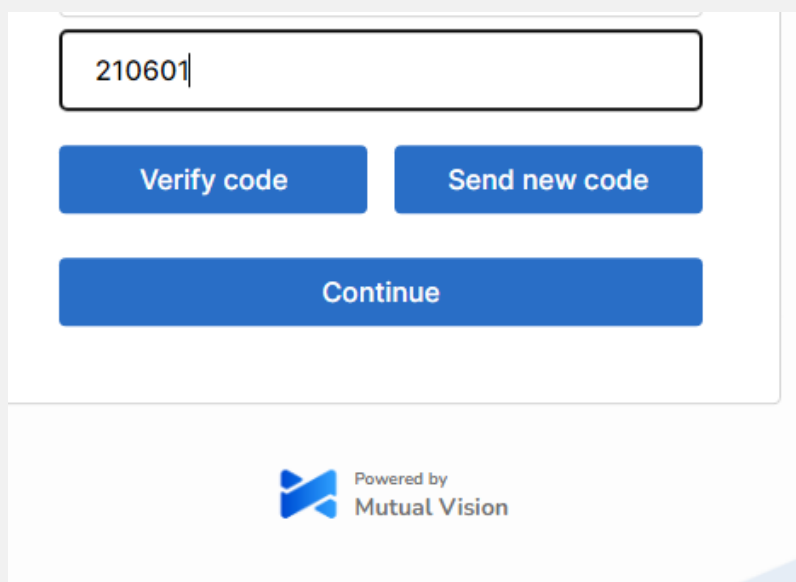
10.g

You will then be sent another verification code to the email address entered



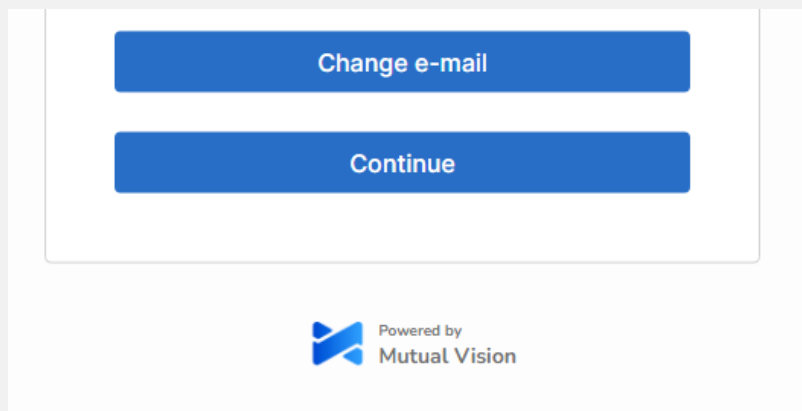
10.h

Please enter this code in the box provided and click on 'Verify code'



10.i

This now confirms you have 'Email address has been verified' You now need to log into the system by clicking on 'Continue'






10.j

You will now be asked to 'Reset your password'. Please enter your 'New Password' and 'Confirm New Password' and click continue.

← Cancel

Reset your password

Continue

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You will now be required to log into the system.



11. Frequently asked Questions

How do I register?	You can register to use The Stafford Intermediary Hub when you visit the site. This will allow you to register and create an application to ourselves. If you have not completed a full paper-based registration form within the last 12 months, or your details have changed, we will require you to submit a new form to complete your registration with the Society before being able to submit an application, this can be obtained from the registration section of the Society's website which can be found here: srbs.co.uk/intermediaries/downloads
Can I submit an application form where I don't have all the supporting documents	Yes, documents can be uploaded during or after submitting the application to the Society.
What should I do if I've forgotten my password?	Simply click on 'forgot password' on the login screen. To help you please view section 9 of this document.
What if I am part way through keying the application and I must log out, will all my work be lost?	No, once your client is set up and you are keying an application you can log out and all of your work will be saved.
Who is my BDM?	Please contact our National Account Manager, Emma Parker (07506906525, Emma.Parker@srbs.co.uk) .
How do I enter a foreign address when creating a client?	Please enter the clients country of residence in the 'Postcode' field, this will allow you to complete the rest of the address manually
Why have I not received your email verification?	Please check your Junk Mail to see if it has been placed in there. If the email still has not arrived please click on send new code.
How do I amend or to add further information to an application once it has been submitted?	Please contact the Mortgage Help Desk on 01785 231 444 . We will then re-activate the form so changes can be made
How do I get a KFI?	The Society currently does not provide KFIs for Intermediaries. The Society normally sources on Mortgage Brain, Trigold, Legal & General and 27Tech.
How do I change my Firms/Network/Mortgage Club details?	Please contact the Mortgage Help Desk on 01785 231 444 . We will then look to update your details for you.