

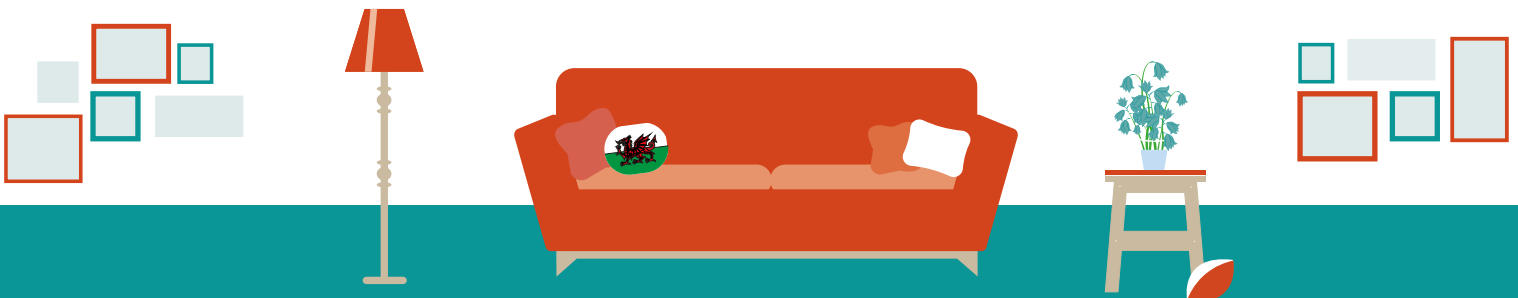


Llywodraeth Cymru  
Welsh Government

# Help to Buy – Wales

## Post Completion Instruction Form

[www.gov.wales/helptobuy](http://www.gov.wales/helptobuy)



# Post Completion Instruction Form



## Confidential

Before applying for a service listed, please read the **Post Completion Guide** for guidance and eligibility. The guide is available to download at [www.gov.wales/helptobuy](http://www.gov.wales/helptobuy)

Please complete the following sections of the Post Completion Instruction Form in full and use **BLOCK CAPITALS** to enable us to process your application quickly.

### Section 1: Personal Details & Service Required

### Section 2: Service Details

### Section 3: Conveyancer/Solicitor Details

### Section 4: Financial Advisor/Other

### Section 5: Additional Information

## Contact us

This form is available in other formats and in Welsh on request. Please contact us to discuss your needs.

Tel: 08000 937 937 option 2

E-mail: [postcompletions@helptobuywales.co.uk](mailto:postcompletions@helptobuywales.co.uk)

Website: [www.gov.wales/helptobuy](http://www.gov.wales/helptobuy)

## Please submit the completed Post Completion Event Instruction Form

by post, fax or e-mail to:

Help to Buy (Wales) Ltd  
1 Capital Quarter  
Tyndall Street  
Cardiff CF10 4BZ

Fax: 029 2080 3451

Buyers' e-mail: [postcompletions@helptobuywales.co.uk](mailto:postcompletions@helptobuywales.co.uk)

## DISCLAIMER

To minimise delay in your application being processed, please ensure all sections are filled in and completed with the appropriate boxes ticked, and all relevant documents are provided. Any applications with missing information will be returned and we will not be responsible for any consequential delays that occur.

## Complaints

If you have a problem with your Equity Mortgage, please try to resolve it with us in the first instance. If you are not happy with the way in which we handled your complaint or the result, you may be able to complain to the Financial Ombudsman Service. If you do not take up your problem with us first you will not be entitled to complain to the Ombudsman. We can provide details of how to contact the Ombudsman.

## Section 1: Personal Details & Service Required

Account reference		HTBW:
	Customer 1	Customer 2 (if applicable)
Title:		
Forename:		
Middle name(s):		
Surname:		
Telephone number(s):		
E-mail address:		
Property Address:		

### Service required

Full Repayment\*

Partial Redemption\*

Redemption on Sale\*

Remortgage\*

Subletting

Lodging

Alterations\*\*

Freehold Purchase\*

\* A solicitor will need to be appointed for these processes.

\*\* A solicitor may need to be appointed for this process.

### Appointed Solicitors and Independent Legal Advice

The First Charge Lender/new First Charge Lender (as applicable) may appoint a solicitor to act on their behalf to complete the relevant process. Their appointed solicitor may be able to act for you which should satisfy our requirements during the process. However, the appointed solicitor may not be able to provide you with Independent Legal Advice (ILA).

**You may seek a second solicitor for ILA if required and tick the relevant box in Section 3 of this form.**

**If you have any questions regarding the legal aspect of these processes,  
please do not hesitate to contact us.**

**We recommend you request an estimate of fees before appointing a solicitor**

## Section 2: Service Details

### Repayment (full or part repayment of the Repayment Sum without selling the Property)

Full Repayment  Partial Repayment

Equity % to be repaid (10%-20%):  
(For a partial repayment, 5% of the Equity Mortgage must remain for the future 2nd full repayment.)

If Partial Repayment: Are you intending to obtain additional borrowing from your First Charge Lender for this repayment?  
(This will require our approval)

YES

NO

A RICS Valuation has been instructed to identify the current Market Value:

YES

NO

### Redemption on Sale (full repayment of the Repayment Sum with proceeds from sale of the Property)

Please confirm sale price/offer accepted?  
(Evidence of this sale price will be required)

£

A RICS valuation has been instructed to identify the current Market Value:

YES

NO

### Remortgage (change of First Charge Lender, but Equity Mortgage remains)

Current First Charge Lender:

New First Charge Lender:

Current First Charge Mortgage Balance:

New First Charge Mortgage Loan:

**No additional borrowing is allowed when changing First Charge Lenders**

### Freehold Purchase

I wish to purchase the Freehold interest:

YES

NO

I wish to purchase the Leasehold interest:

YES

NO

I wish to merge the Freehold and Leasehold interest:

YES

NO

## Section 2: Service Details (Continued)

### Lodging/Subletting \*Refer to the Subletting Section of the Post Completions Guide

Beginning date:

End date: \*Sublet: Maximum term 12 months

Please provide reason for Lodging:

Please provide a detailed reason for Subletting\*:

\* Please ensure you review the evidence required within the Post Completion Guide. We may request further information following our initial review.

### Alterations \*Refer to the Alterations Section of the Post Completions Guide

Please provide reason and detail of the planned Alterations:

\* We may request further information following our initial review.

Are you intending to obtain additional borrowing from your First Charge Lender to pay for the planned Alterations?

YES

NO

### Section 3: Conveyancer/Solicitor Details

The First Charge Lender has appointed a solicitor to complete the relevant process:	YES <input type="checkbox"/>	NO <input type="checkbox"/>
The First Charge Lender's solicitor will also be acting for me/us in the relevant process:	YES <input type="checkbox"/>	NO <input type="checkbox"/>
<b>The below two boxes <i>must</i> have a different response:</b>		
I will be instructing my own solicitor to provide Independent Legal Advice (ILA)*:	YES <input type="checkbox"/>	NO <input type="checkbox"/>
I wish to waive my right to take Independent Legal Advice (ILA). I will be using the First Charge Lender's appointed solicitor.	YES <input type="checkbox"/>	NO <input type="checkbox"/>

#### Conveyancer/Solicitor Details

Company Name:	
Company/Branch Address:	Contact Name:
	Telephone Number(s):
	E-mail Address:

#### You may seek a second solicitor for ILA if required and confirmed yes above.

Company Name:	
Company/Branch Address:	Contact Name:
	Telephone Number(s):
	E-mail Address:

**Independent Financial Advisor (IFA)/Mortgage Advisor**

Company Name:

Company/Branch Address:

Contact Name:

Telephone Number(s):

E-mail Address:

**RICS Valuer**

Company Name:

Company/Branch Address:

Contact Name:

Telephone Number(s):

E-mail Address:

**Other \*If you wish a 3rd party to act upon your behalf (partner/family member)**

Name:

Address:

Telephone Number(s):

E-mail address:

## Section 5: Additional Information

Please tell us your preferred method of communication:	Welsh	English
Customer 1	<input type="checkbox"/>	<input type="checkbox"/>
Customer 2	<input type="checkbox"/>	<input type="checkbox"/>

**To help us identify you and protect any data sensitive documents we send, please provide a password which uses lower case letters and numbers only. Please also provide an appropriate password hint.**

Password:

*(No special characters allowable. Use lower case letters and numbers only.)*

Password Hint:

*(Must be different to the password.)*

All information I/We give to you on this form (and information resulting from contact with my/our landlord, Valuer, Employer, Conveyancer/Solicitor/Accountant, Independent Financial Adviser and/or Mortgage Broker) may be shared with the same only in relation to this application.

Help to Buy (Wales) Ltd manages the Scheme on behalf of the Welsh Government and is authorised and regulated by the Financial Conduct Authority for credit related activities not covered by an exemption. Help to Buy (Wales) Ltd – Registered in England and Wales under number 8708403 at Unit J, Yale Business Village, Ellice Way, Wrexham LL13 7YL.