

Broker Declaration of Client Vulnerabilities

We know you care about your clients and want to find them the right outcomes. Thinking about what your customers end goal is and removing any obstacles in their way will help you to do so. If your client has any special requirements, please tell us by phone, or using this form and we'll do all we can to provide the help and support they need.

Don't be afraid to tell us. Declaring their vulnerabilities helps us to fully assess the case and support your client.

You'll need to make sure you have obtained your client's consent to share their special requirements with us. Or, make sure you have an alternative lawful basis under data protection law for doing so.

Please note: Only Applicants and their broker are able to provide consent.

Client Details

First Name

Surname

Date of Birth

Application Reference

Special Requirements

Why do you need support?

Select all that apply

	Addiction	<input type="checkbox"/>
	Age related difficulties	<input type="checkbox"/>
	Bereavement	<input type="checkbox"/>
	Carer in place	<input type="checkbox"/>
	Experiencing financial or domestic abuse	<input type="checkbox"/>
	Financial worries	<input type="checkbox"/>
	Hearing or visual impairment	<input type="checkbox"/>
	Lack of support structure/ network	<input type="checkbox"/>
	Language barriers	<input type="checkbox"/>
	Limited digital/ computer knowledge	<input type="checkbox"/>
	Limited knowledge or confidence in managing finances	<input type="checkbox"/>
	Literacy or numeracy challenges	<input type="checkbox"/>
	Mental capacity	<input type="checkbox"/>
	Mental health	<input type="checkbox"/>
	Physical disability	<input type="checkbox"/>
	Relationship breakdown	<input type="checkbox"/>
	Severe or long term illness	<input type="checkbox"/>
	Short term injury/ illness	<input type="checkbox"/>

What action(s) do we need to take to help you?

Select all that apply

Allow me to finish my sentences
Allow trusted person to support me
Ask for our own security word
Ask questions about transactions
Check my understanding
Ensure face is visible so I can lip read
Give me extra time to make decisions
Large print or Braille needed
May need help completing forms
May need to use a magnifying glass
Offer to provide private space
Only communicate by email
Only communicate by phone
Only communicate by post
Talk louder
Talk slower
Use plain English/ no jargon

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Is there any other information we need to know to provide the right support?

Is the support temporary, long term or permanent?

Are you the Applicant or Broker?

Applicant ☐ Broker ☐

If we need any further information or to clarify any details to make sure we can offer the right support, then we'll be in touch.

Broker Confirmation (tick as appropriate)

In submitting this form, you are confirming your client is aware that:

- We will store these preferences on their records and it will be available to Saffron's colleagues
- We will use this information to support them when managing their accounts or they contact us
- They can contact us at any time if they need to make any changes

Confirmed by Broker ☐

OR

The Applicant hasn't declared/ I haven't identified any vulnerabilities or Special Requirements

Confirmed by Broker ☐

Please upload this to your client's mortgage application with Saffron