

Mortgage transfer checklist

Is your mortgage or part of it (if you have multiple tranches) about to expire and are you considering using this opportunity to switch your mortgage to Credit Suisse? This checklist will help you prepare for a meeting with our Financing Experts.

- Check your credit contract or product agreement to see exactly when your mortgage or the tranche will expire. You can arrange your new mortgage with us as early as 36 months before your current one expires.
- When looking at your current financing, determine whether your current bank insists on a notice period and allow for this in your schedule.
- Analyze your current circumstances. Is the solution you chose still suited to your current financial needs and obligations? What are your future plans as regards your current owner-occupied home?
- Review current mortgage interest rates and interest rate forecasts. Think about the aspects of a mortgage that are important to you. Do you prefer to be able to calculate your mortgage costs for the coming years in advance in order to have greater certainty in your financial planning? Or are you prepared to accept interest rate fluctuations?
- Our Financing Experts will help you to find the right mortgage product that meets your needs in full. Find out in advance about our mortgage products; to do so, you can consult our product overview, general brochure on mortgages, and other topics relating to owner-occupied homes on our website.
- Make an appointment with our Financing Experts to discuss your personal situation, your mortgage solution, and the next steps for the mortgage transfer.
- To ensure speedy processing of your request, it is important that your documents are up to date and complete. Documentation from your current financial partner, such as credit documents and details of collateral (e.g. mortgage note) can be helpful. You will find all the documents to be submitted in the Checklist for Mortgage Application Documents.
- Our Financing Experts will guide and assist you with the actual steps of the transfer to ensure that it is processed smoothly. They will support you from the initial meeting until the transfer of your mortgage to Credit Suisse is complete.

Contact for an appointment

Opening hours: Monday to Friday from 8:00 a.m.-8:00 p.m.

Telephone: 0844 100 114*

credit-suisse.com/mortgages

* Telephone calls may be recorded.

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