

## 0345 241 3079 quotationrequests@castletrust.co.uk www.castletrust.co.uk

## Quote request - Owner Occupier

Section 1					
Broker / Packager name			Date		
Your BDM					
Broker / Packager email					
Borrower(s) name					
Security address (Please complete a schedule A when there is more than a single property proposed as security)					
Security value					
Required Castle Trust loan amount					
Product type	Roll-up Term	Serviced Term		of rolled interest iced interest	
	Roll-up Bridge	Serviced Bridge			
Loan term (years)	One Two	Three Four	Five		
Section 2			Internal use o	only - PF	
		Country of recidence		only - PF	
Nationality		Country of residence	ce	only - PF	
	High Net Worth Status	Country of residence Business Purpose Exer	ce	only - PF	
Nationality	High Net Worth Status		ce	only - PF	
Nationality Loan class			ce	only - PF	
Nationality Loan class  Tax status Is the Borrower(s) a UK results If yes, what is each Borrower's top rate of			mpt		
Nationality Loan class  Tax status Is the Borrower(s) a UK results If yes, what is each	sident for tax purposes?		mpt Yes	No	15%
Nationality Loan class  Tax status Is the Borrower(s) a UK results If yes, what is each Borrower's top rate of	sident for tax purposes?		mpt Yes Top tax rate	No No	15%
Nationality Loan class  Tax status Is the Borrower(s) a UK results If yes, what is each Borrower's top rate of	sident for tax purposes?		Top tax rate	40% 40% 40% 40%	
Nationality Loan class  Tax status Is the Borrower(s) a UK results If yes, what is each Borrower's top rate of	sident for tax purposes?		Top tax rate  20%  20%	40%	15%

If <b>no</b> , please list each Borrower's country of	Borrower's name			С	Country of tax residence		
ax residence							
Purpose of the Castle							
Trust loan What is the Borrower's repayment strategy?							
Third party lender first	charge details below						
Which lender will hold the	If Second Charge, please state outstanding first charge balance						
first charge? Mortgage type	Fixed	Tracker	Other		e state)	Interest	
Expiry date of fixed or	Tixed			· · · · · · · · · · · · · · · · · · ·		rate	
tracker rate			erm of mortga	ge remaining	unexpired (y	ears)	
Security details							
Monthly rental income		Optional monthly p	additional payment		N	umber of bedrooms	
	Detached	Semi-detache	ed Ter	raced	Flat	Studio If studio, m <sup>2</sup>	
	Freehold	Leasehold		Years left or	n lease		
Extra information f	or ESIS	•		'			
Can the Borrower(s) provid accountant?	e a statutory High Net Wo	rth statement s	signed by a qua	lified	Yes	No	
Will the Borrower(s) provide	e a signed High Net Worth	declaration?			Yes	No	
Does the Borrower(s) have	the right to work and perr	manently reside	e in the United	Kingdom?	Yes	No	
f no, has the Borrower(s) re	esided in the United Kingd	lom for the last	three years?		Yes	No	
Are all Borrowers who appe	ear on the mortgage deed	included in ou	r terms and ES	IS?	Yes	No	
Is this a face-to-face or non	-face-to-face transaction?				Face-to-f	face Non-face-to-fa	
Borrower(s) name	Date	e of birth	Borrower(s)	name		Date of birth	

## **Important information**

Loans are subject to status, terms and conditions. The customer must repay the loan by the end of the term. If the customer has not repaid the loan by the end of its term and either does not have sufficient savings or is not able to arrange another mortgage, then they will need to sell their property. Property may be repossessed if the loan is not paid when due. This communication is for authorised intermediaries only. This information has not been approved for use with customers and is not intended for public or customer use.

Castle Trust | Belvedere House, Basing View, Basingstoke RG21 4HG | Tel: 0345 241 3079 | www.castletrust.co.uk
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