



# Quote request - Owner Occupier

If you wish to obtain a rate indication please complete Section 1 only. For formal terms please complete both sections.

### Section 1

Broker / Packager name	<input type="text"/>	Date	<input type="text"/>
Your BDM	<input type="text"/>		
Broker / Packager email	<input type="text"/>		
Borrower(s) name	<input type="text"/>		
Security address	<input type="text"/>		
Security value	<input type="text"/>	Please state outstanding first charge balance	<input type="text"/>
Required Castle Trust Bank loan amount	<input type="text"/>		
Is this a refinancing of an existing Castle Trust Bank loan?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
If yes, what is the case number?	<input type="text"/>		
Product variant	<input type="checkbox"/> Bridge <input type="checkbox"/> Term		
Loan term	<input type="text"/>		
Loan class	<input type="checkbox"/> High Net Worth Status <input type="checkbox"/> Business Purpose Exempt		
Purpose of the Castle Trust loan	<input type="text"/>		
What is the Borrower's repayment strategy?	<input type="text"/>		

### Section 2

Internal use only - PF

Nationality	<input type="text"/>	Country of residence	<input type="text"/>	
Does the Borrower own more than three mortgaged BTL properties?	<input type="checkbox"/> Yes <input type="checkbox"/> No			
<b>Tax status</b>				
Is the Borrower(s) a UK resident for tax purposes?	<input type="checkbox"/> Yes <input type="checkbox"/> No			
If <b>yes</b> , what is each Borrower's top rate of Income Tax?	Borrower's name	Top tax rate		
	<input type="text"/>	<input type="checkbox"/> 20%	<input type="checkbox"/> 40%	<input type="checkbox"/> 45%
	<input type="text"/>	<input type="checkbox"/> 20%	<input type="checkbox"/> 40%	<input type="checkbox"/> 45%
	<input type="text"/>	<input type="checkbox"/> 20%	<input type="checkbox"/> 40%	<input type="checkbox"/> 45%
<input type="text"/>	<input type="checkbox"/> 20%	<input type="checkbox"/> 40%	<input type="checkbox"/> 45%	

If no, please list each Borrower's country of tax residence

Borrower's name	Country of tax residence

**Third party lender first charge details below**

Which lender will hold the first charge?

Mortgage type  Fixed  Tracker  Other  (please state) Interest rate

Expiry date of fixed or tracker rate  Term of mortgage remaining unexpired (years)

**Security details**

Number of bedrooms

Detached  Semi-detached  Terraced  Flat  Studio If studio, m<sup>2</sup>   
 Freehold  Leasehold  Years left on lease

**Extra information for ESIS (High Net Worth exemption only)**

- Can the Borrower(s) provide a statutory High Net Worth statement signed by a qualified accountant?  Yes  No
- Will the Borrower(s) provide a signed High Net Worth declaration?  Yes  No
- Does the Borrower(s) have the right to work and permanently reside in the United Kingdom?  Yes  No
- If no, has the Borrower(s) resided in the United Kingdom for the last three years?  Yes  No
- Are all Borrowers who appear on the mortgage deed included in our terms and ESIS?  Yes  No
- Is this a face-to-face or non-face-to-face transaction?  Face-to-face  Non-face-to-face

Borrower(s) name	Date of birth	Borrower(s) name	Date of birth

Is the broker charging a fee?  Yes  No If yes, please state the amount

**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.

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