



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 Date

Your BDM

Broker / Packager email

Borrower(s) name

Security address

Security value Please state outstanding first charge balance

Required Castle Trust Bank loan amount

Is this a refinancing of an existing Castle Trust Bank loan? Yes No

If yes, what is the case number?

Product variant Bridge Term

Loan term

Loan class High Net Worth Status Business Purpose Exempt

Purpose of the Castle Trust loan

What is the Borrower's repayment strategy?

Section 2

Internal use only - PF

Nationality Country of residence

Does the Borrower own more than three mortgaged BTL properties? Yes No

Tax status

Is the Borrower(s) a UK resident for tax purposes? Yes No

If **yes**, what is each Borrower's top rate of Income Tax?

Borrower's name	Top tax rate		
<input style="width: 95%;" type="text"/>	<input type="checkbox"/> 20%	<input type="checkbox"/> 40%	<input type="checkbox"/> 45%
<input style="width: 95%;" type="text"/>	<input type="checkbox"/> 20%	<input type="checkbox"/> 40%	<input type="checkbox"/> 45%
<input style="width: 95%;" type="text"/>	<input type="checkbox"/> 20%	<input type="checkbox"/> 40%	<input type="checkbox"/> 45%
<input style="width: 95%;" 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, m²
 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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