



## Quote request - BTL individual

If you wish to obtain a rate indication or Bridging terms, please complete Section 1 only. For formal terms of the rest of our products, please complete all 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 <small>(Please complete a schedule A when there is more than a single property proposed as Security)</small>	<input type="text"/>		
Security value	<input type="text"/>	If Second Charge, 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 type	<input type="checkbox"/> Roll-up	<input type="checkbox"/> Serviced	<input type="checkbox"/> Blend
	<input type="checkbox"/> Bridging	<input type="checkbox"/> TermTen	<input type="checkbox"/> SVR (refinance only)
Product variant	<input type="checkbox"/> Bridge	<input type="checkbox"/> Term	<input type="checkbox"/> TermTen
Loan term	<input type="text"/>		

Section 2		Internal use only - PF																				
Nationality	<input type="text"/>	<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?	<table border="1"> <thead> <tr> <th>Borrower's name</th> <th colspan="3">Top tax rate</th> </tr> </thead> <tbody> <tr> <td><input type="text"/></td> <td><input type="checkbox"/> 20%</td> <td><input type="checkbox"/> 40%</td> <td><input type="checkbox"/> 45%</td> </tr> <tr> <td><input type="text"/></td> <td><input type="checkbox"/> 20%</td> <td><input type="checkbox"/> 40%</td> <td><input type="checkbox"/> 45%</td> </tr> <tr> <td><input type="text"/></td> <td><input type="checkbox"/> 20%</td> <td><input type="checkbox"/> 40%</td> <td><input type="checkbox"/> 45%</td> </tr> <tr> <td><input type="text"/></td> <td><input type="checkbox"/> 20%</td> <td><input type="checkbox"/> 40%</td> <td><input type="checkbox"/> 45%</td> </tr> </tbody> </table>		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%
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If **no**, please list each Borrower's country of tax residence

Borrower's name	Country of tax residence

Purpose of the Castle Trust Bank loan

Express Service?

 Yes  No (Title insurance fee and £300 arrangement fee are required, see our website)

What is the Borrower's repayment strategy?

**If second charge is requested, provide the 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**

Monthly rental income

 Optional additional monthly payment  Number of bedrooms 
 Detached  Semi-detached  Terraced  Flat  Studio If studio, m<sup>2</sup> 
 Freehold  Leasehold  Years left on lease

 Holiday Let  Student Let  HMO

**If Security is an HMO, please provide the details below**

Number of lettable rooms

 How many kitchens at the Security?  How many storeys does the Security have? 

Is the Security a purpose built HMO?

 Yes  No Is the primary lender aware that the Security is an HMO?  Yes  No

Will the Borrower(s) hold the relevant HMO licence upon completion?  
Castle Trust Bank will require verification via the conveyancing solicitor

 Yes  No

Is there any other information that Castle Trust Bank should be aware of?

**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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