



## Quotation request - BTL individual

If all individual asset values are below £1 million and you wish to purely obtain a rate indication, please complete **Section 1** only. If any single asset value is over £1 million or you wish to apply for formal terms, please complete **Section 1 and Section 2** fully. If you are applying for a **Credit Recovery mortgage**, you will also need to fill out the Credit Recovery enquiry form available at [www.castletrust.co.uk/creditrecovery](http://www.castletrust.co.uk/creditrecovery).

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)	<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 loan amount	<input type="text"/>		
Product type	<input type="checkbox"/> Roll-up Term	<input type="checkbox"/> Serviced Term	<input type="checkbox"/> A blend of rolled interest and serviced interest
	<input type="checkbox"/> Roll-up Bridge	<input type="checkbox"/> Serviced Bridge	<input type="checkbox"/> Refurb to Let
Loan term (years)	<input type="checkbox"/> One	<input type="checkbox"/> Two	<input type="checkbox"/> Three <input type="checkbox"/> Four <input type="checkbox"/> Five

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?	Borrowers name		Top tax rate		
	<input type="checkbox"/> 20%	<input type="checkbox"/> 40%	<input type="checkbox"/> 45%		
	<input type="checkbox"/> 20%	<input type="checkbox"/> 40%	<input type="checkbox"/> 45%		
	<input type="checkbox"/> 20%	<input type="checkbox"/> 40%	<input type="checkbox"/> 45%		
	<input type="checkbox"/> 20%	<input type="checkbox"/> 40%	<input type="checkbox"/> 45%		

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

Borrowers name	Country of tax residence

Purpose of the Castle Trust loan

Does your client want the Express Service?  Yes  No (Title insurance fee and £300 arrangement fee are required, see our website)

What is the client's repayment strategy?

Legal charge proposed  First charge  Second charge

**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  Sqm<sup>2</sup> If studio

Freehold  Leasehold  Years left on lease

Holiday Let  HMO Please indicate the applicable HMO type below

Student Let  Yes  No

**HMO details**

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 a HMO?  Yes  No

Will the Borrowers hold the relevant HMO licence upon completion?  Yes  No  
Castle Trust will require verification via the conveyancing solicitor

Any other information that Castle Trust should be aware of?

Borrower's name	Date 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.