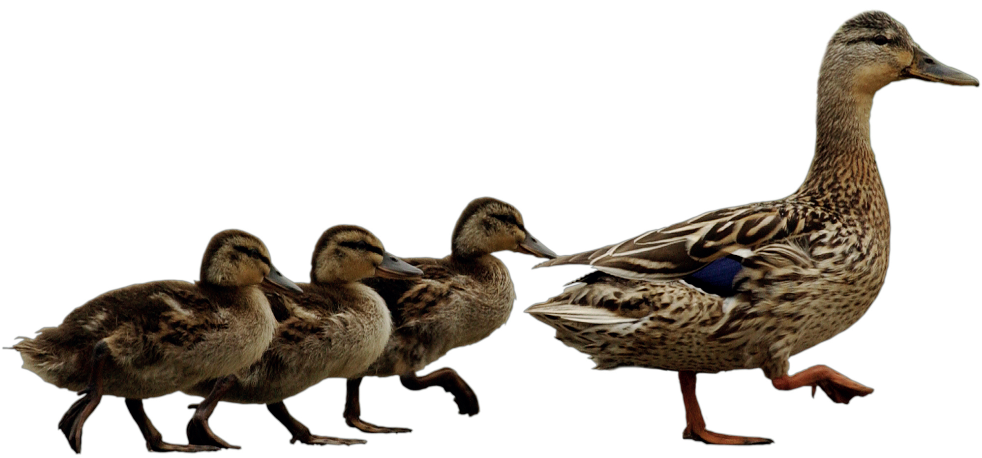
0345 241 3079
www.castletrust.co.uk

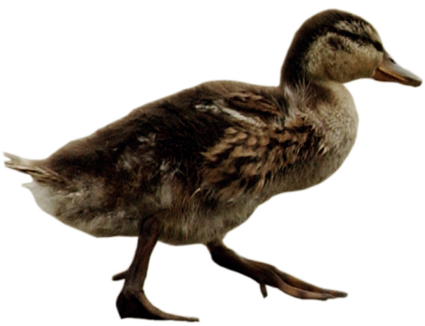
Submitting a case guide

A step by step guide on how to request a quote and submit an application



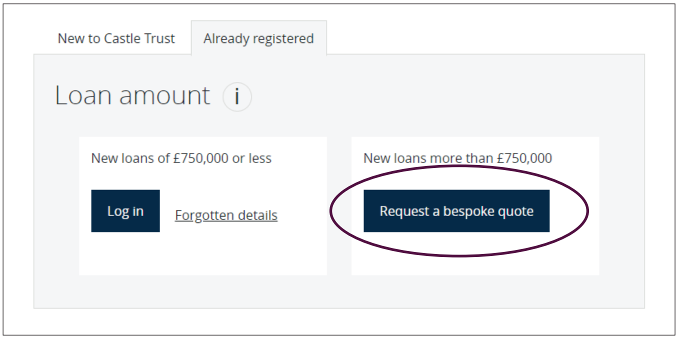
This guide is designed to help our brokers become more familiar with our quote and application process. For new loans, our expert team will provide bespoke terms individually tailored to your client's circumstances.

If you have any questions throughout the process, please don't hesitate to contact the Sales Support team on **0345 241 3079** and they will be happy to help you.

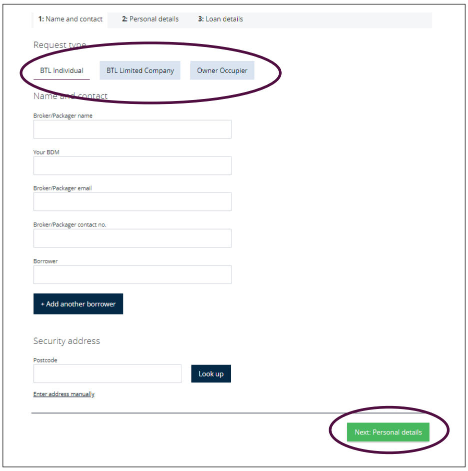


1. Go to www.castletrust.co.uk/intermediaries-mortgages
2. Click on 'Quote request'

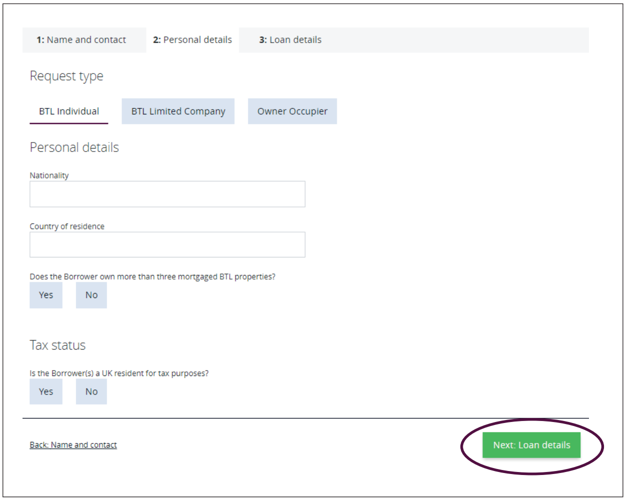
3. On the ‘Already registered’ tab, click ‘Request a bespoke quote’



4. Make sure you are choosing the right product tab (BtL Individual / BtL Limited Company / Owner Occupier) and then complete the Name and contact details. When you are finished, click ‘Next: Personal details’.

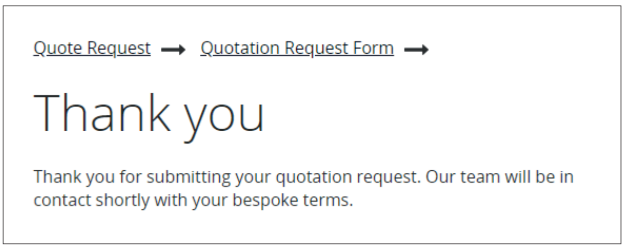


5. Complete the Personal details information and click 'Next: Loan details'.



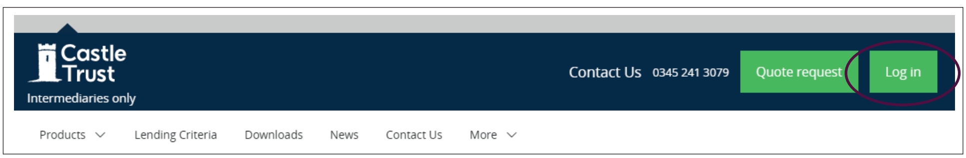
6. Complete the Loan details information and click 'Submit form'.

7. You will receive an email with a copy of the details you have submitted and a member of our team will be in contact with your quote shortly.

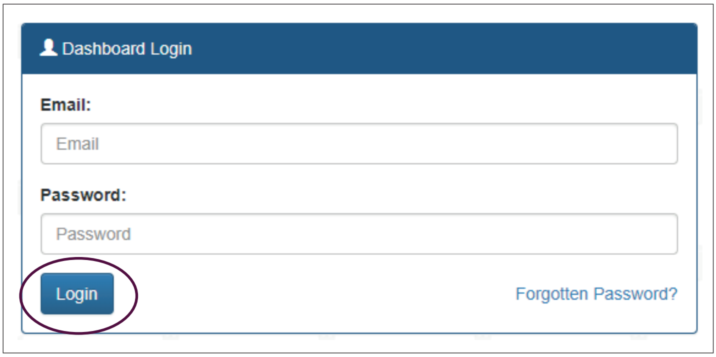


8. When you have received your quote from the pricing team, go to www.castletrust.co.uk/intermediaries-mortgages

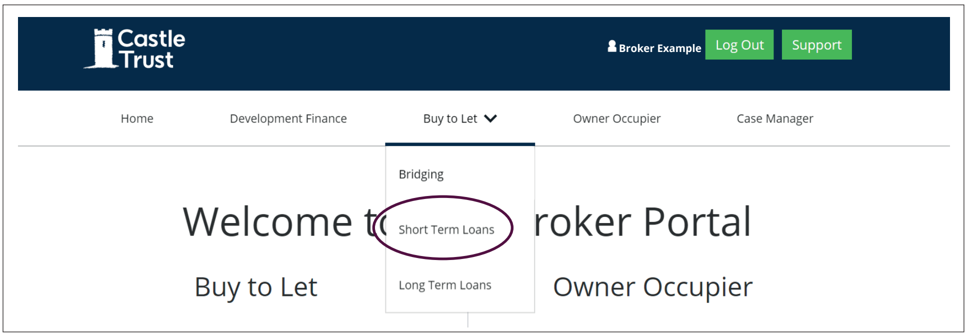
9. Click on 'Log in'



10. Type in your email address and password and click 'Login'

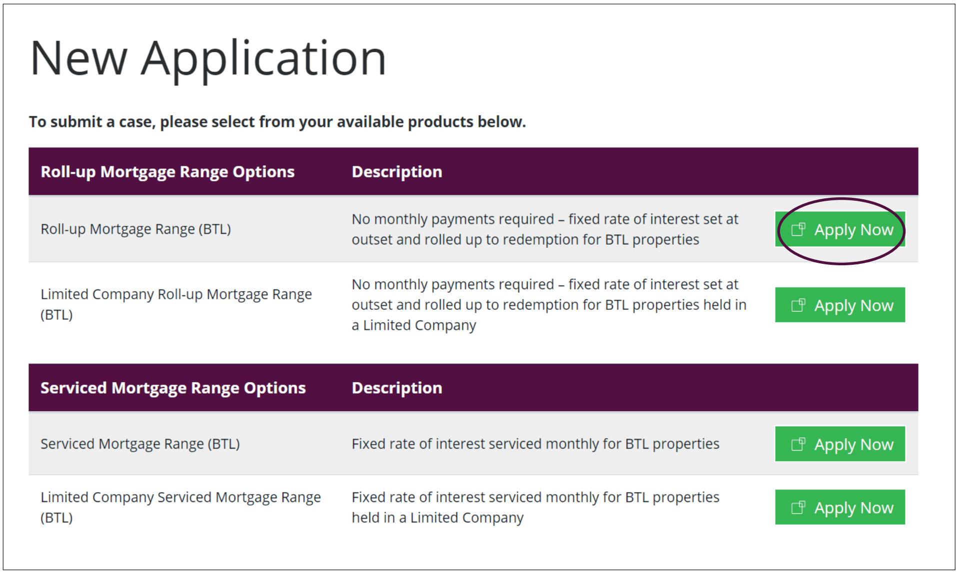


11. On the home screen, select the customer type from the following: Development Finance, Buy to Let or Owner Occupier. For this example, we are going to choose Short Term Loans from the Buy to Let drop down menu.



12. In order to be ready to apply, you will have received your bespoke terms from our pricing team. Select 'Yes' to proceed.

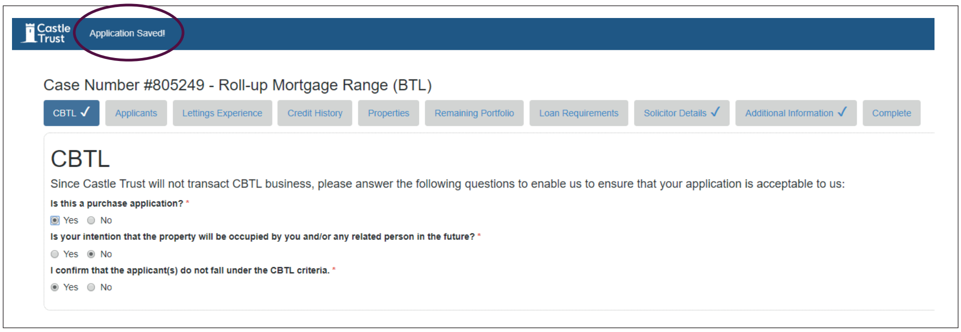
13. Find the product you need and select 'Apply Now'.



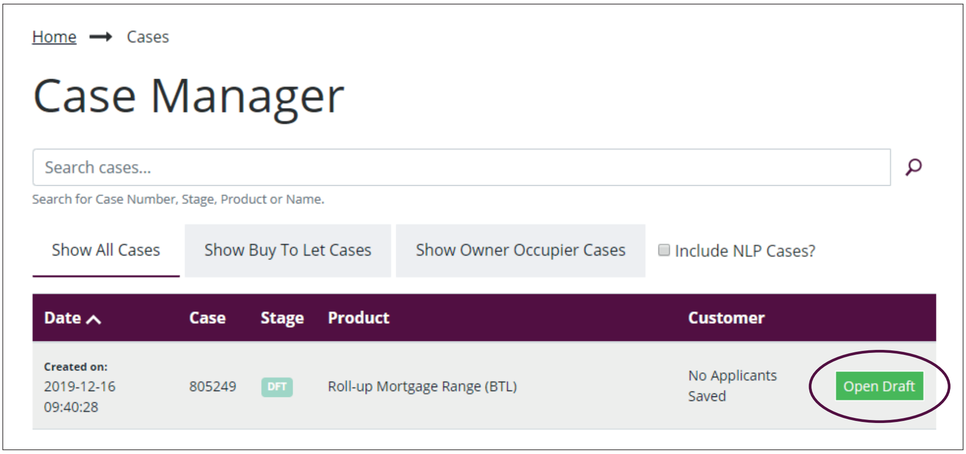
14. You will be presented with two screens of important information which require confirmation that you have understood them. Then you will be able to start entering your client's details required for the application.

15. You will then be assigned a Case Number and you can start entering the details of the case. You can easily move between tabs by clicking on the tab you require.

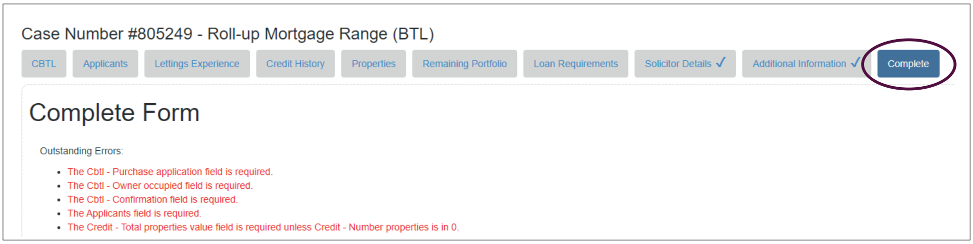
16. Each time you make a change to the application it will be automatically saved; you will be able to see the autosave feature working next to the Castle Trust logo. This feature means you can close the window and come back to your application later.



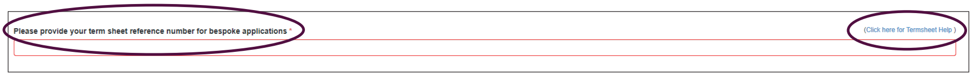
17. Draft applications will be saved in Case Manager in the Broker Portal. From here, you can open a draft application and continue to complete the information required.



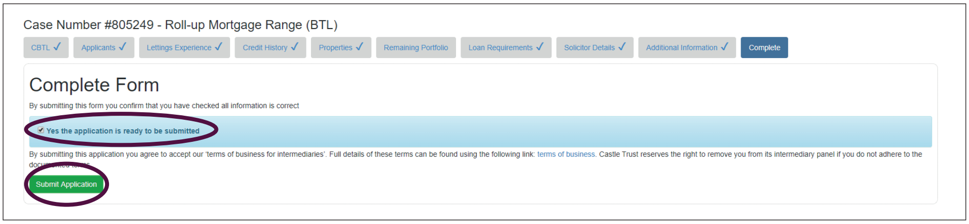
18. The 'Complete' tab will show you a list of the outstanding requirements for the application; you can use this to track your progress. This is what the 'Complete' tab will look like before you have submitted any information.



19. On the 'Loan Requirements' tab, you will be asked to enter your term sheet reference number. If you do not have this to hand, you will be able to find this in the email sent to you containing your terms. For further help on finding your termsheet reference number, click on the link on the right-hand side.



20. When you have submitted all of the requirements, the 'Complete' tab will display a declaration confirming the application is ready to be submitted and that all the information is correct. Click the tick box to confirm and then press 'Submit Application'.



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