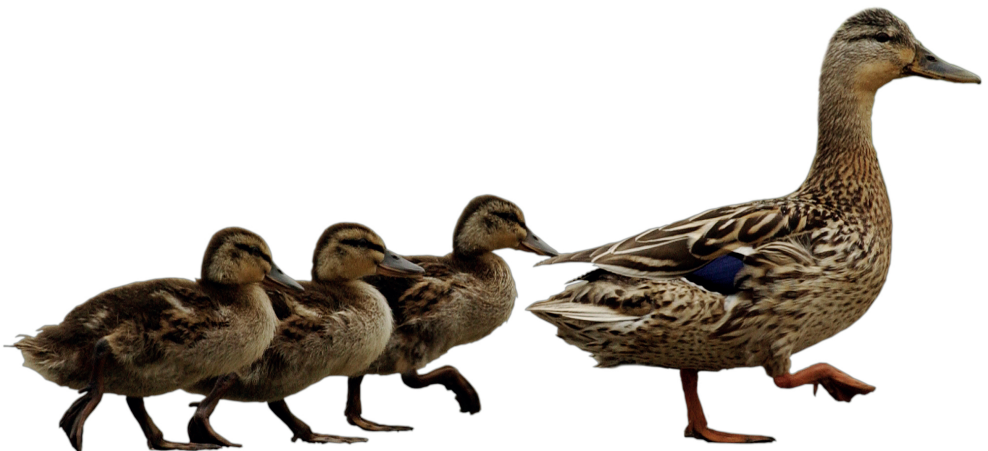




0345 241 3079  
[www.castletrust.co.uk](http://www.castletrust.co.uk)

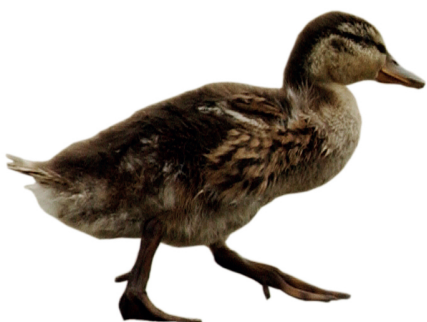
# Submitting a case guide

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



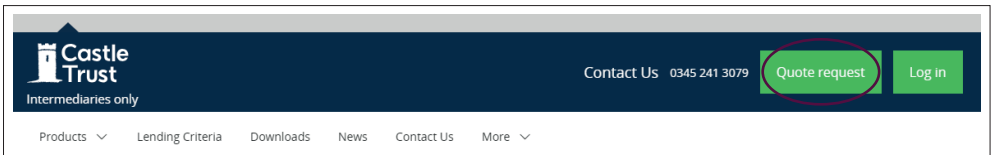
This guide is designed to help our brokers become more familiar with our quote and application process. For new loans, our expert team will provide bespoke terms individually tailored to your client's circumstances.

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.

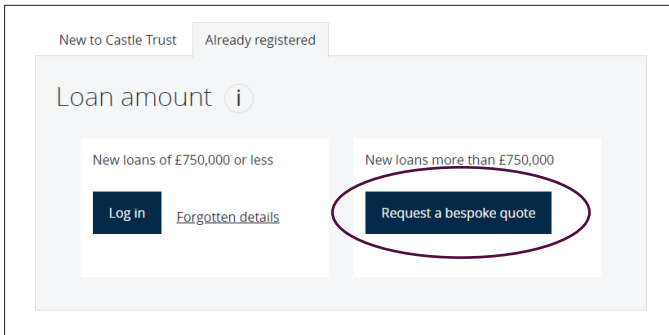


1. Go to [www.castletrust.co.uk/intermediaries-mortgages](http://www.castletrust.co.uk/intermediaries-mortgages)

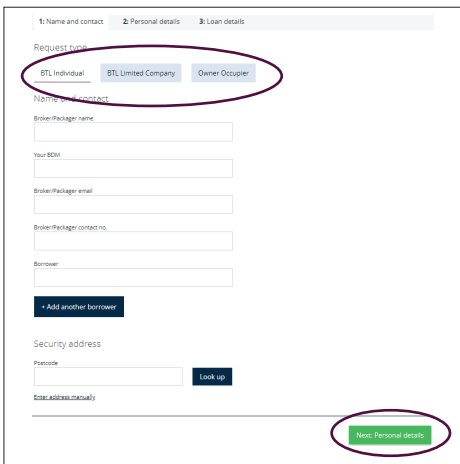
2. Click on 'Quote request'



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'.

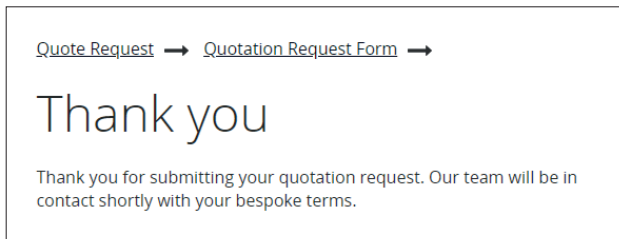
The image shows a registration form with three tabs at the top: '1: Name and contact', '2: Personal details', and '3: Loan details'. Under the '1: Name and contact' tab, there are three sub-tabs for 'Request type': 'BtL Individual', 'BtL Limited Company', and 'Owner Occupier', all of which are circled in red. Below these are several input fields for contact information: 'Broker/Package name', 'Your BOM', 'Broker/Package email', 'Broker/Package contact no.', and 'Borrower'. There is a '+ Add another borrower' button. At the bottom, there is a 'Security address' section with a 'Password' field and a 'Look up' button. At the very bottom right, there is a 'Next: Personal details' button, which is also circled in red.

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

The screenshot shows a multi-step form with three tabs: '1: Name and contact', '2: Personal details', and '3: Loan details'. The '2: Personal details' tab is active. Below the tabs, there are sections for 'Request type' (with buttons for 'BTL Individual', 'BTL Limited Company', and 'Owner Occupier'), 'Personal details' (with input fields for 'Nationality' and 'Country of residence'), and two questions with 'Yes'/'No' buttons: 'Does the Borrower own more than three mortgaged BTL properties?' and 'Is the Borrower(s) a UK resident for tax purposes?'. At the bottom, there is a 'Back: Name and contact' link and a green 'Next: Loan details' button, which is circled in red.

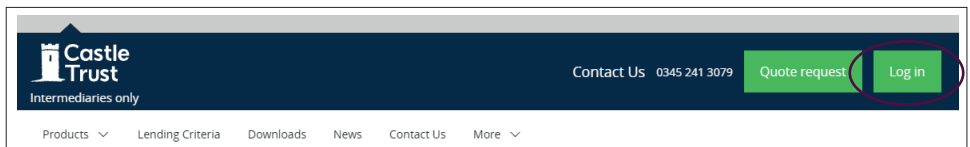
6. Complete the Loan details information and click 'Submit form'.

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](http://www.castletrust.co.uk/intermediaries-mortgages)

9. Click on 'Log in'



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

Dashboard Login

Email:

Email

Password:

Password

Login

Forgotten Password?

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.

Castle Trust

Broker Example Log Out Support

Home Development Finance Buy to Let Owner Occupier Case Manager

Welcome to Broker Portal

Buy to Let Owner Occupier

Bridging

Short Term Loans

Long Term Loans

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

Home → Buy To Let → New Application

# New Bespoke Application

Do you have bespoke terms with Castle Trust

Yes

No

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

# New Application

To submit a case, please select from your available products below.

Roll-up Mortgage Range Options	Description	
Roll-up Mortgage Range (BTL)	No monthly payments required – fixed rate of interest set at outset and rolled up to redemption for BTL properties	<a href="#">Apply Now</a>
Limited Company Roll-up Mortgage Range (BTL)	No monthly payments required – fixed rate of interest set at outset and rolled up to redemption for BTL properties held in a Limited Company	<a href="#">Apply Now</a>

Serviced Mortgage Range Options	Description	
Serviced Mortgage Range (BTL)	Fixed rate of interest serviced monthly for BTL properties	<a href="#">Apply Now</a>
Limited Company Serviced Mortgage Range (BTL)	Fixed rate of interest serviced monthly for BTL properties held in a Limited Company	<a href="#">Apply Now</a>

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.

Case Number **#805249** Roll-up Mortgage Range (BTL)

- CBTL**
- Applicants
- Lettings Experience
- Credit History
- Properties
- Remaining Portfolio
- Loan Requirements
- Solicitor Details ✓
- Additional Information ✓
- Complete

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.

The screenshot shows the top navigation bar of the Castle Trust application. The 'Castle Trust' logo is on the left, and 'Application Saved!' is displayed on the right, circled in red. Below the navigation bar, the page title is 'Case Number #805249 - Roll-up Mortgage Range (BTL)'. A series of tabs are visible: 'CBTL' (checked), 'Applicants', 'Lettings Experience', 'Credit History', 'Properties', 'Remaining Portfolio', 'Loan Requirements', 'Solicitor Details' (checked), 'Additional Information' (checked), and 'Complete'. The main content area is titled 'CBTL' and contains a message: 'Since Castle Trust will not transact CBTL business, please answer the following questions to enable us to ensure that your application is acceptable to us:'. Below this are three questions with radio button options: 'Is this a purchase application?', 'Is your intention that the property will be occupied by you and/or any related person in the future?', and 'I confirm that the applicant(s) do not fall under the CBTL criteria.'.

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.

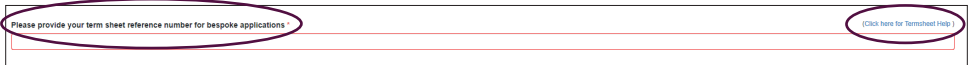
The screenshot shows the 'Case Manager' interface. At the top, there is a breadcrumb 'Home → Cases' and a search bar with the text 'Search cases...'. Below the search bar, there is a filter section with buttons for 'Show All Cases', 'Show Buy To Let Cases', 'Show Owner Occupier Cases', and a checkbox for 'Include NLP Cases?'. A table of cases is displayed below, with columns for 'Date', 'Case', 'Stage', 'Product', and 'Customer'. The first row shows a case created on '2019-12-16 09:40:28' with Case ID '805249', Stage 'DFT', Product 'Roll-up Mortgage Range (BTL)', and Customer 'No Applicants Saved'. The 'Open Draft' button in the 'Customer' column is circled in red.

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.

The screenshot shows the 'Complete Form' interface for Case Number #805249 - Roll-up Mortgage Range (BTL). The 'Complete' tab is selected and circled in red. Below the tabs, the section is titled 'Complete Form' and contains a list of 'Outstanding Errors':

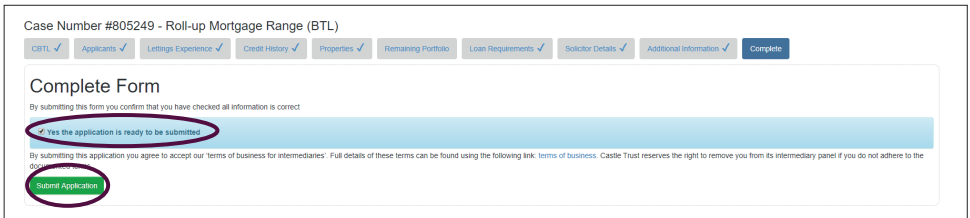
- The CbtI - Purchase application field is required.
- The CbtI - Owner occupied field is required.
- The CbtI - Confirmation field is required.
- The Applicants field is required.
- The Credit - Total properties value field is required unless Credit - Number properties is in 0.

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.



A screenshot of a form field. On the left side, there is a text prompt: "Please provide your term sheet reference number for bespoke applications". On the right side, there is a link: "Click here for Termsheet Help". Both the text and the link are circled in red.

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'.



A screenshot of the 'Complete Form' screen. At the top, it says "Case Number #805249 - Roll-up Mortgage Range (BTL)". Below this is a progress bar with several tabs: "CBTL", "Applicants", "Lettings Experience", "Credit History", "Properties", "Remaining Portfolio", "Loan Requirements", "Selector Details", "Additional Information", and "Complete". The "Loan Requirements" tab is currently selected. The main content area is titled "Complete Form" and contains the text: "By submitting this form you confirm that you have checked all information is correct". Below this text is a blue bar with a tick box and the text "Yes the application is ready to be submitted". At the bottom of the form is a green button labeled "Submit Application". The tick box and the "Submit Application" button are circled in red.

If you require any help throughout this process, please call the Sales Support team on 0345 241 3079.

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