



CLIENT

WELCOME PACK



HI THERE!

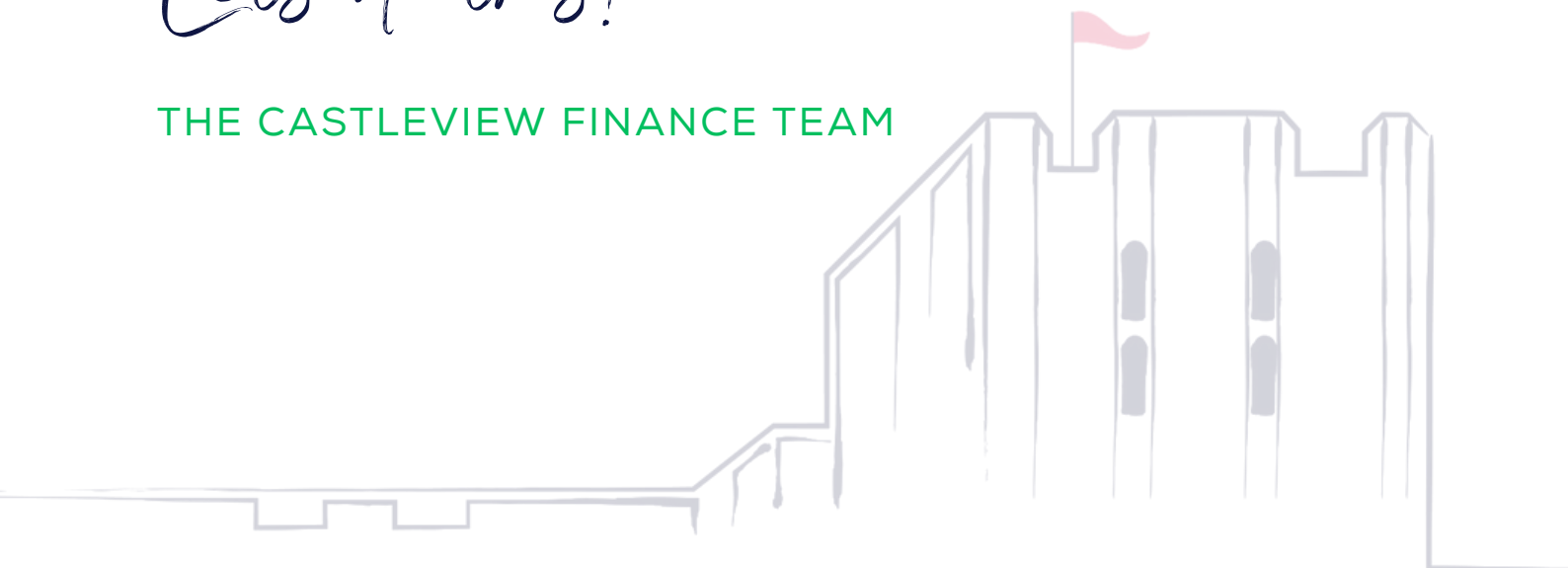
WELCOME TO CASTLE VIEW FINANCE.

We're delighted to have you as a part of our Castle View family. At Castle View Finance, we're all about practicality and personalised support. Our dedicated team is here to provide expert guidance and tailored solutions as you navigate your mortgage journey.

As you take steps towards your property goals, know that Castle View Finance is here to make the process efficient and transparent. We're excited to work together and look forward to a successful partnership.

Let's do this!

THE CASTLEVIEW FINANCE TEAM



WHAT TO EXPECT

Searching for the perfect mortgage solution and all of the paperwork that comes with it, can be overwhelming. With Castle View Finance we simplify the process for you. Our expert team is dedicated to helping you secure the ideal mortgage that suits your needs and goals.



ONBOARDING PROCESS

After our Discovery Call, we streamline the process by collecting necessary documents to verify your personal and financial information. This meticulous approach ensures accuracy and efficiency.



TAILORED RESEARCH AND RECOMMENDATION

Our brokers analyse your finances to match you with the best lender, considering rates, repayments, and incentives. You'll get personalised recommendations for each option.



SMOOTH APPLICATION SUBMISSION/DECISION

After discussing the right mortgage, we help you accurately fill out application forms and serve as your intermediary. We handle the entire submission process with the recommended lender. Once you receive an AIP (Agreement in Principle)/ DIP (discussion in principle), you can confidently explore homes or properties and move forward



TRANSPARENT MORTGAGE OFFER AND ACCEPTANCE

Once you find your property, we assist with the full application, review the lender's offer together, and ensure your clear understanding before acceptance



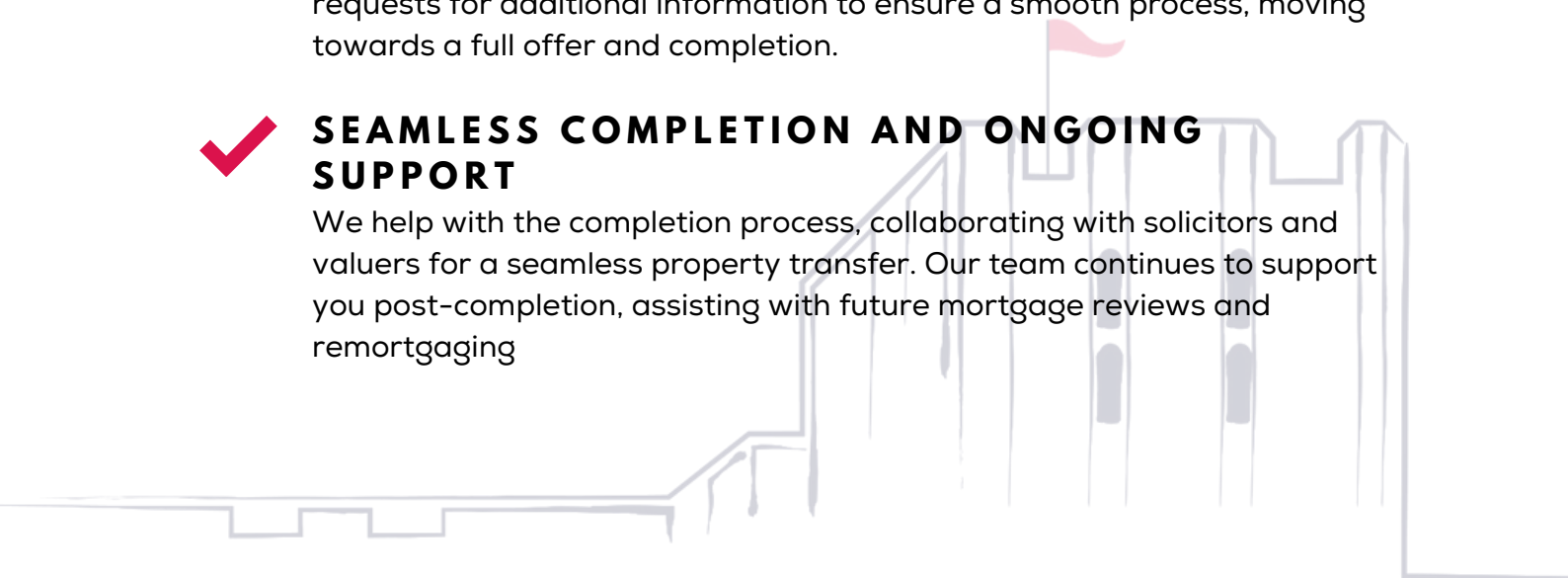
EFFECTIVE COMMUNICATION

We maintain constant communication with the lender, keeping you informed of the progress. Our team efficiently addresses any queries or requests for additional information to ensure a smooth process, moving towards a full offer and completion.



SEAMLESS COMPLETION AND ONGOING SUPPORT

We help with the completion process, collaborating with solicitors and valuers for a seamless property transfer. Our team continues to support you post-completion, assisting with future mortgage reviews and remortgaging



DOCUMENT CHECKLIST

COMPLETED FACT FIND

- Your Broker will provide this document to complete

PORTFOLIO

Detail all BTL properties and residential properties you have any ownership in, including personal name, any limited companies, LLP's or trusts.

Your broker can provide a portfolio spreadsheet document to complete, if you do not have your own

ID

- Passport or picture driving license - document must be in-date and signed. The copy of the document provided must show all four corners of the signature and picture page.
- Share code of right to reside in the UK (for those with a Non- British Passport)

PROOF OF ADDRESS

- Must be dated within the last 2 months
- Utility bill, bank statement, mortgage statement etc.- if council bill it needs to be dated in the current year,

FULL CREDIT REPORT

- Must be [CheckMyFile](#), [Experian](#), [Equifax](#)

SIGNED TERMS OF BUSINESS

- Your Broker will provide this document to complete

■ LAST 3 MONTHS' PERSONAL BANK STATEMENTS

- Please ensure it has your name and address on, transaction lists cannot be accepted.
- We need all bank accounts used which show your income and expenditure, including bills.
- Include statements showing proof of deposit (saving accounts etc)

■ LAST 3 MONTHS' BUSINESS BANK STATEMENTS

- Please ensure it has the company name and address on, transaction lists cannot be accepted.
- If this is a company application we need company bank statements.
- If self- employed we need any business bank statements used for your income.

■ LAST 3 MONTHS' BANK STATEMENTS FOR RENTAL PROPERTIES

- Please ensure it has the company name and address on, transaction lists cannot be accepted.
- All accounts for properties owned by yourselves in personal name , limited company, trust or LLP, evidencing rental income and mortgage payments

■ IF EMPLOYED: LAST 3 MONTHS OF PAYSLEIPS

■ LAST 2 YEARS TAX CALCULATIONS AND TAX YEAR OVERVIEWS

- Only relevant if you submitted tax returns, find [our guide](#) on how to provide these documents.

If you have any questions, please [Get in Touch.](#)

ABOUT US

At Castle View Finance, we are committed to making your mortgage journey a seamless and successful one. Our dedicated team of professionals is here to assist you every step of the way.

Whether you have questions about the application process, need guidance on your mortgage application or simply seek further clarification, we are always just a phone call or email away. Your satisfaction is our priority, and we take pride in offering personalised and reliable service.

MEET OUR TEAM



James Vince
Managing Director



Jordan Price
Operations Director



Michael Nicholson
Senior Mortgage & Protection
Advisor

TOOLS & RESOURCES

01 OUR SOCIAL MEDIA CHANNELS

Stay informed with our daily informative posts on social media. Connect with us on Instagram and Facebook, and be sure to follow for updates.

02 OUR YOUTUBE CHANNEL

Visit our YouTube channel for informative and useful videos.

03 OUR WEBSITE

Explore our website for valuable insights and beneficial guidance.

04 HOW TO DOWNLOAD YOUR TAX CALCULATIONS AND OVERVIEW

Use our Blog Post to see our step by step guide into how to download your tax calculations and tax year overview.

HOW TO REACH US



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Connect with Castle View Finance

