

Portfolio Landlord Questionnaire

This form can be used for multiple applicants if their portfolios are the same.

Account Number/'s:
(Provide all linked applications)

This form is to be completed by the landlord, where the landlord has 4 or more mortgaged BTL properties, or the cumulative total of all mortgaged BTL owned by all parties to the mortgage is 4 or more. This includes BTL properties owned in sole name, joint names, limited company, or limited liability partnership. Please provide full details of BTL's below, including the security property if a remortgage application.

	Name	Number of years you have been a landlord	Number of Properties owned
Applicant 1			
Applicant 2			
Applicant 3			
Applicant 4			
SPV (if applicable)			

1. What is the property investment objective for the whole portfolio? (Tick all appropriate.)

Capital Growth Income Retirement planning Other (Please specify)

2. What are the management arrangements of the portfolio (Tick all appropriate.)

Self-managed Managing Agent Maintenance Contractors Other (please provide further information)

3. What type of property does the portfolio consist of? Excluding commercial property. (Tick all appropriate.)

House in Multiple Occupation (HMO) Multi unit freehold block (MUFB) Flat House Shared

4. What type of tenants do you have in your portfolio? (Tick all appropriate.)

Student Professional Family Corporate

5. Regarding rental voids, please confirm:

- How do you plan to manage any rental voids?
- How many have you had across your portfolio in the last 12 months and how were these managed?

6. With regards to your property portfolio, please confirm whether any overdue tax owing up until this point, has been paid.

Yes

No
(please provide
explanation including
any arrangements.)

7. Please provide details of any known future plans for your portfolio over the next 12 months i.e.

- a) Proposed purchases/remortgages (include where properties are located, values, property types.)
b) Any restructuring plans for the portfolio including incorporation, partnership etc

8. Anticipated known funding requirements from Fleet Mortgages over the next 12 months.

9. Buy to Let Portfolio Cash Flow

	Previous Tax Year	Current Tax Year	Forecast following tax year	Notes
Gross Mortgage Payments <small>Things to consider: End of fixed rate periods, SVR, additional borrowing considerations, properties being sold</small>				
Letting Fees <small>Things to consider: New tenancy agreements, advertising, finders fees, general management</small>				
Legal and Professional Fees <small>Things to consider: Solicitors, accountants, brokers, legal fees for evicting tenants, amending of tenancies, general legal advice required</small>				
Ground Rent and Service Charge <small>Things to consider: Include costs for leasehold properties, estate charges</small>				
Maintenance, Repairs etc <small>Things to include: All expenses for decorating/gardening, general maintenance and upkeep (window cleaning etc), cost of purchase or replacement with white goods</small>				
Other (expenses not included elsewhere) <small>Things to consider: Insurance (building or landlord), utility bills covered by the landlord, license fees including HMO and EPC</small>				
Total Expenditure				
BTL Gross Portfolio Rental Income <small>Things to consider: Rental voids, properties being sold or purchased, rental increases, changes to tenancy types</small>				
Total Income After Expenses				