

Buy to Let Portfolio

Landlord Business Plan and Assets & Liabilities



Please complete this form, which provides information on how your Portfolio is managed and your future plans. This information will be used to support our lending decision.

Mortgage Reference Number:

Date:

Personal details

Applicant	Name	Years experience as a landlord
1		
2		
3		
4		

Portfolio Strategy

Investment strategy - what is the primary purpose of your portfolio?

To generate a sole source of income: Retirement planning:

Capital appreciation: To generate an additional income stream:

Other (please specify)

Investment strategy - what is the primary purpose of your portfolio?

Increase size: Maintain size: Reduce size:

Operating Model

Which of the following are in place for your applicant(s) infrastructure (please select the ones that apply):

Letting agent: Solicitors:

Accountants: Property Management:

Details of void periods in the last 12 months?

Total number of void periods	Total length of void periods	Total cost of void periods (rent lost)	Strategy for covering potential future void periods
	months	£	

How regularly are properties refurbished and/or maintenance works carried out:

Every 6 months: Every 12 months:

Every 2 years: Every 3 years:

Amount spent in last 12 months	How much of your annual rental income (per property) do you set aside for maintenance?
£	£

Assets & Liabilities

Please provide details of any other assets and liabilities for each applicant (you do not need to duplicate properties included on the property schedule, or other liabilities declared in the application form)

Applicant 1		Applicant 2		Applicant 3		Applicant 4	
Assets	Value	Assets	Value	Assets	Value	Assets	Value
Savings	£	Savings	£	Savings	£	Savings	£
Investments	£	Investments	£	Investments	£	Investments	£
Public Company Shares	£	Public Company Shares	£	Public Company Shares	£	Public Company Shares	£
Debtors	£	Debtors	£	Debtors	£	Debtors	£
Other	£	Other	£	Other	£	Other	£
Type of Liability	Value	Type of Liability	Value	Type of Liability	Value	Type of Liability	Value
	£		£		£		£
	£		£		£		£
	£		£		£		£

Declaration

We confirm that the information given is true, accurate, complete and not misleading to the best of my/our knowledge and belief. I/We acknowledge that the rental income from any properties that I/We own may be used when calculating affordability, and that I/We will notify Leek Building Society promptly of any changes that may occur before the mortgage is completed.

I (broker/applicant) confirm the above information is accurate.

Name

Signature

Date