

Portfolio Landlord Questionnaire

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

If the applicants own a different number of properties, please provide a separate questionnaire for each applicant.

Account Number(s):

(Provide all linked applications)

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

	Name	Number of years you have been a landlord	Number of BTL Properties owned*
Applicant 1			
Applicant 2			
Applicant 3			
Applicant 4			

* Individually, jointly or through shareholding within a Limited Company. If a property is shared between applicants, please count as one for each Applicant.

Please confirm if the client has any tax payable to HMRC?

Yes

No

(If yes, please confirm if this is overdue and provide an explanation including any arrangements)

Buy-to-Let Portfolio CashFlow

* Please note, we would expect the annual totals for Gross Mortgage Payments and BTL Gross Portfolio Rental Income to correspond to the monthly totals seen on the Property Schedule. The forecast should reflect any planned purchases etc

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