

BTL applicant's assets & liabilities

- portfolio landlords



Applicant's surname

Portfolio management details

	House No.	Postcode	Planned investments/ repairs/ refurbishments (type and cost)	Investment plans (refinancing/ move to Ltd Co structure/sell property)	Loan maturity repayment strategy	Lender	Rental Income
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							

Business strategy - To be completed if you are applying for a Buy to Let Limited Company mortgage or have 4 or more properties (including the property to be mortgaged as a Buy to Let)

Plans for expansion of the portfolio (eg. number, location, type of property, type of tenant)

Details of future plans finance/investments (eg. releasing equity in the portfolio to fund further purchases)

Other sources of funds for future investments (consider deposits, stamp duty, taxation and tax relief reductions)

Details of expectation for future cash flows in the properties (eg. rent increases, either for existing tenants or new)

Details of planned changes to circumstances (eg. move to fully managing the properties, becoming a fulltime landlord etc)