

Property

What is the address of the property?	
What type of property is it? (eg 2 bedroom flat, semi-detached house)	
Is there a tenant? (If so, from and until when)	YES / NO NAME: FROM TO
Are there any arrears, if so what action are you taking?	YES / NO £
Is there a deposit? If so how much and where is it held?	YES / NO £
Are the safety certificates up to date?	YES / NO
When did you buy the property?	
In whose name(s) was the property bought?	
How much did you buy the property for?	£
How much do you think the property is worth today?	£
Is the property currently on the market? (If so, please provide sales particulars and valuation)	YES / NO
Who was your mortgage with when you purchased the property?	
How much did you borrow?	£
Who is your mortgage with now? (name, address and reference)	
How much do you owe on this mortgage today?	£
Is there any early repayment penalty? (If so, how much until when?)	YES / NO

Have they agreed the property can be rented?	YES / NO
Do you have an ISA/PEP/Pension/Endowment attached to this mortgage (if so, provide details)	YES / NO
If you raised extra funds by remortgaging, what did you use the extra funds for?	£
Have you taken out any loans secured against your property?	YES / NO
If yes, in what month and year did this happen?	
Who did you borrow the money from? (name, address and reference)	
How much did you borrow?	£
What was the money used for?	
How much do you owe on this loan today?	£

Property
Monthly Income and Expenditure Account

	£	£
Rent		
Other Receipts		
Total Income		
Mortgage Payment		
Secured Loan		
Service Charge		
Ground Rent		
Letting Agents		
Insurance		
Safety Certificates		
Repairs		
Other Expenses 1		
Other Expenses 2		
Other Expenses 3		
Other Expenses 4		
Other Expenses 5		
Other Expenses 6		
Total Expenditure		
Surplus/(Deficit)		

If there is a deficit, how are you funding it?	
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