

Existing property portfolio details

Date completed	Precise Mortgages application reference(s)				Broker name			
Name of applicant	1.	2.	3.	4.				
Which applicant does this relate to? (enter 1, 2, 3, 4)								
Limited Company?	<input type="checkbox"/> Yes <input type="checkbox"/> No Name:	<input type="checkbox"/> Yes <input type="checkbox"/> No Name:	<input type="checkbox"/> Yes <input type="checkbox"/> No Name:	<input type="checkbox"/> Yes <input type="checkbox"/> No Name:	<input type="checkbox"/> Yes <input type="checkbox"/> No Name:	<input type="checkbox"/> Yes <input type="checkbox"/> No Name:	<input type="checkbox"/> Yes <input type="checkbox"/> No Name:	<input type="checkbox"/> Yes <input type="checkbox"/> No Name:
Property address								
Postcode								
Number of bedrooms								
Property type/style	<input type="checkbox"/> House <input type="checkbox"/> Bungalow	<input type="checkbox"/> House <input type="checkbox"/> Bungalow	<input type="checkbox"/> House <input type="checkbox"/> Bungalow	<input type="checkbox"/> House <input type="checkbox"/> Bungalow	<input type="checkbox"/> House <input type="checkbox"/> Bungalow	<input type="checkbox"/> House <input type="checkbox"/> Bungalow	<input type="checkbox"/> House <input type="checkbox"/> Bungalow	<input type="checkbox"/> House <input type="checkbox"/> Bungalow
	<input type="checkbox"/> Detached	<input type="checkbox"/> Detached	<input type="checkbox"/> Detached	<input type="checkbox"/> Detached	<input type="checkbox"/> Detached	<input type="checkbox"/> Detached	<input type="checkbox"/> Detached	<input type="checkbox"/> Detached
	<input type="checkbox"/> Semi-Detached	<input type="checkbox"/> Semi-Detached	<input type="checkbox"/> Semi-Detached	<input type="checkbox"/> Semi-Detached	<input type="checkbox"/> Semi-Detached	<input type="checkbox"/> Semi-Detached	<input type="checkbox"/> Semi-Detached	<input type="checkbox"/> Semi-Detached
	<input type="checkbox"/> End Terraced	<input type="checkbox"/> End Terraced	<input type="checkbox"/> End Terraced	<input type="checkbox"/> End Terraced	<input type="checkbox"/> End Terraced	<input type="checkbox"/> End Terraced	<input type="checkbox"/> End Terraced	<input type="checkbox"/> End Terraced
Flat	<input type="checkbox"/> Flat	<input type="checkbox"/> Flat	<input type="checkbox"/> Flat	<input type="checkbox"/> Flat	<input type="checkbox"/> Flat	<input type="checkbox"/> Flat	<input type="checkbox"/> Flat	<input type="checkbox"/> Flat
	<input type="checkbox"/> Converted Flat	<input type="checkbox"/> Converted Flat	<input type="checkbox"/> Converted Flat	<input type="checkbox"/> Converted Flat	<input type="checkbox"/> Converted Flat	<input type="checkbox"/> Converted Flat	<input type="checkbox"/> Converted Flat	<input type="checkbox"/> Converted Flat
	<input type="checkbox"/> Purpose Built Flat	<input type="checkbox"/> Purpose Built Flat	<input type="checkbox"/> Purpose Built Flat	<input type="checkbox"/> Purpose Built Flat	<input type="checkbox"/> Purpose Built Flat	<input type="checkbox"/> Purpose Built Flat	<input type="checkbox"/> Purpose Built Flat	<input type="checkbox"/> Purpose Built Flat
HMO	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Multi-unit property	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Estimated valuation	£	£	£	£	£	£	£	£
Current mortgage balance	£	£	£	£	£	£	£	£
Monthly mortgage payment	£	£	£	£	£	£	£	£
Repayment type								
Monthly rent received	£	£	£	£	£	£	£	£

You must include all residential investment properties you have an interest in. This includes those you own in your sole name, own in joint names or are owned by a company of which you are a director or shareholder. If the applicant is a limited company properties owned by the company's directors and shareholders or owned by other companies of which the directors/shareholders are a shareholder or director should also be included. Information provided on this document will be used to carry out AVMs (Automated Valuation Model).

We can provide literature in large print, Braille and audio tape. Please ask us for this leaflet in an alternative format if you need it.

Precise Mortgages is a trading name of Charter Court Financial Services Limited which is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register Firm Reference Number 494549). Registered in England and Wales with company number 06749498. Registered office: 2 Charter Court, Broadlands, Wolverhampton WV10 6TD

Buy to Let, HMO or Multi-unit?

When completing our Existing Property Portfolio form you will need to state the types of property your customer holds. We understand that this may not always be clear, which is why we have produced this handy guide to help you:

Standard Buy to Let



Single dwelling



One tenancy agreement



Occupied as a family unit

The property will be let as a single dwelling with no more than one tenancy agreement in place for all occupants. The tenants will occupy the property as a family unit.

Houses in multiple occupation (HMO)



Single dwelling



At least 3 tenants in occupation



Shared toilet, bathroom or kitchen facilities

A HMO is a single dwelling with at least 3 tenants in occupation, who form more than one household. The tenants will share toilet, bathroom or kitchen facilities and multiple tenancy agreements may be in place.

Multi-unit



Single property containing separate units or flats



Held on a single freehold title

A Multi-unit property is a single structure that contains separate self contained units or flats that are held on a single freehold title. There will be separate tenancy agreements for each unit.

Tips for completing our Existing Property Portfolio form:

- ▶ Use the tick boxes on the Existing Property Portfolio form to identify if the property is a HMO or a Multi-unit, if these are not selected we will assume the property is a standard buy to let which may delay our assessment.
- ▶ If the units within a Multi-unit property benefit from their own leasehold titles, these will be considered individual buy to let properties and should be entered onto the form as such.
- ▶ All residential buy to let properties the applicant has an interest in need to be included on the form.
- ▶ We can accept the portfolio information in any format, but by using our forms you will ensure we have all the information we need.

Get in touch

Contact your local BDM

0800 116 4385

[precisemortgages.co.uk](https://www.precisemortgages.co.uk)



The specialist lender you can bank on

FOR INTERMEDIARY USE ONLY.

Precise Mortgages is a trading name of Charter Court Financial Services Limited which is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority (Financial Services Register Firm Reference Number 494549). Registered in England and Wales (company number 06749498). Registered office: 2 Charter Court, Broadlands, Wolverhampton WV10 6TD.

02022 (4)