

Assets & Liabilities and Business Plan

**Please do not include any buy to let properties on the assets and liabilities statement.
Buy to let properties will be taken into account on the existing property portfolio form.**

Precise Mortgages application reference(s)					
Statement of financial position as at: / /			Date completed: / /		
Applicant 1			Applicant 2		
First name:			First name:		
Surname:			Surname:		
Experience as a landlord: years			Experience as a landlord: years		
Property investment objective					
<input type="checkbox"/> To generate a sole source of income			<input type="checkbox"/> Capital appreciation		
<input type="checkbox"/> To generate an additional income stream			<input type="checkbox"/> Retirement planning		
Other (please specify)					
Operating model					
Do you use a letting agent? <input type="checkbox"/> Yes <input type="checkbox"/> No					
How do you manage void periods? <input type="checkbox"/> Savings <input type="checkbox"/> Income <input type="checkbox"/> Surplus rental income <input type="checkbox"/> Personal liquid assets					
Other (please specify)					
Portfolio strategy (please tick all that apply)					
Property type <input type="checkbox"/> House <input type="checkbox"/> Bungalow <input type="checkbox"/> Flat <input type="checkbox"/> New Build <input type="checkbox"/> Multi-unit					
Tenant type <input type="checkbox"/> Single tenancy agreement <input type="checkbox"/> Multiple tenancy agreement/HMO					
Assets (e.g. cash, cash equivalents, commercial property values, current residential property value, holiday homes, items of large material value, ISAs (savings), pensions, shares, stocks, bonds, securities, vehicles)					
Applicant 1, 2 or joint	Description	£	Applicant 1, 2 or joint	Description	£
		£			£
		£			£
		£			£
		£			£
		£			£
		£			£
		£			£
		£			£
Total assets		£	Total liabilities		£
		£			£

For Limited Company applications with more than two guarantors, please use a second form.

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.