

SUBMISSION REQUIREMENTS QUESTIONNAIRE

May 2021

Customer details					
Customer name			Account number		
Property transaction details					
Source of applicant's income					
Assets			Liabilities		
Applicant	Description	Amount (£)	Applicant	Description	Amount (£)
Portfolio tenant profile (number)					
Single family residence <input style="width: 40px;" type="text"/>		Student let <input style="width: 40px;" type="text"/>		DSS <input style="width: 40px;" type="text"/>	
Local Authority / Housing Association <input style="width: 40px;" type="text"/>		Other <input style="width: 40px;" type="text"/>		Corporate let <input style="width: 40px;" type="text"/>	
Additional information					
Management of portfolio					
Future strategy and funding requirements for the next 12 months					
Source of wealth					
Additional comments					

Here you can find descriptions and examples of all of the fields within the questionnaire.

Property transaction details

Please provide details of this transaction structure.

For example: deposit source; unusual title specifics, incorporation details and any information that is relevant to the underwriting decision.

Source of applicant's income

Please set out where your salary figures have been obtained.

For example: details of where the figures are visible on the supporting documentation.

Assets and liabilities information

Please provide details of any other assets and liabilities in addition to your property portfolio.

For example: investments or other mortgages.

Assets examples: cash, cash equivalents, commercial property values, current residential property value, holiday homes, items of large material value, ISAs (savings), pensions, shares, stocks, bonds, securities and vehicles.

Liabilities examples: commercial property mortgages, credit cards, current residential property mortgage, hire purchase, holiday home mortgages, loans, maintenance, overdrafts and tax liabilities.

Portfolio tenant profile

Please provide the number of these types of tenancies across the landlord's portfolio.

Management of portfolio

Please provide an overview of the portfolio management and the supporting infrastructure.

For example: any employees, management agents and local agents, and information about how rent is collected, tenants are found and vetted, and agreements are issued etc.

Future strategy and funding requirements for the next 12 months

For example: proposed acquisitions/sales, contingency plans to cover property void periods and any restructuring plans for the business, including incorporation and partnership.

Source of wealth

Please provide information on the original source of wealth used to acquire the properties in the applicant's portfolio.


For example: inheritance, previously high-income earner and a breakdown of portfolio growth.

Additional comments

Please provide any further information you feel is relevant in support of the application.

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