

Customer 1

Title: Forename(s):

Surname:

Current Address:

Postcode

Customer 2

Title: Forename(s):

Surname:

Current Address:

Postcode

Customer 3

Title: Forename(s):

Surname:

Current Address:

Postcode

Customer 4

Title: Forename(s):

Surname:

Current Address:

Postcode

1. Do you intend changing the size of your property portfolio over the next 12 months?

- Increase Decrease No change
- A. By 1 property B. By 2-3 properties C. By 4-5 properties D. By 6+ properties

2. If Increasing (1) above, do you intend to purchase under a Ltd Company basis (SPV)?

- Yes No

3. How will you manage an increase of 1-2% in interest rates? Tick all that apply

- A.** Increase rent
- B.** Use excess rent from portfolio to cover shortfall
- C.** Make capital reduction
- D.** Re-mortgage to a new provider
- E.** Sell property to reduce overall mortgage balance of portfolio

4. Over the next 12 months do you intend to transfer any privately held properties into a Ltd Company (SPV)?

- Yes No

5. Are you managing your property portfolio for capital growth or rental yield? Tick all that apply

- A.** Capital growth **B.** Rental yield

6. Do you expect or anticipate over the next 12 months your gross rental income will

- Increase Decrease No change
- A.** by 1-5% **B.** by 5-10% **C.** by 10%+

7. How do you intend to manage any change in tax rules affecting your net profit? Tick all that apply

- A.** Increase rent **B.** Reducing associated costs e.g. Homecover Insurance
- C.** Not intending to change approach **D.** Unaware of changes to tax rules

8. Do you intend to make improvements to the properties over the next 12 months?

- Yes No

9. If yes to (8) above, how will you fund the improvements?

- A.** Remortgage **B.** Savings/retained profit
- C.** Other (please state): _____

10. How do you manage your portfolio?

- Self-managed Managing agent Combination of self-managed & managing agent

11. If buying new properties over the next 12 months, will you be purchasing in the same location or different location?

- A. Same location B. Different location

12. Have you experienced rental voids on any properties in the last 12 months?

- Yes No

- A. 1 month B. 2-3 month C. 4-6 months D. more than 7 months

13. If yes to (12), how were these managed? Tick all that apply

- A. Surplus funds from property portfolio B. Using own income (not rental income)
- C. Savings D. Re-mortgaging/refinancing any outstanding debt

Signatures and declarations

Vida Homeloans reserve the right to request evidence of the details provided.

I/We declare that this business plan is a true and correct description of my/our position.

Signature: Customer 1

Date:

Signature: Customer 2

Date:

Signature: Customer 3

Date:

Signature: Customer 4

Date:

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