

PROPERTY QUESTIONNAIRE

Contact Details

Name: _____
Address: _____
Contact Number: _____
Introducer: _____

Part 1: Personal Information

1. Are you UK resident or non UK resident? _____
 - If not, what are your plans for returning to UK in the future? _____

2. How many properties do you own (excluding your main residence)? _____
 - Of these properties, how many are solely owned by yourself (100% ownership)? _____
 - How many of these properties are jointly owned with another partner? _____
 - Is the joint owner your spouse or someone else? _____
 - What is your joint owner's name (Please add all names if more than 1 joint owner) _____

3. Do you rent any of these properties? _____
 - If yes, are the properties rented or available to rent to a 3rd party on a commercial basis or someone connected to you i.e. family member? _____

4. What is your estimated annual income (excluding property income)?

5. What is your joint owner's estimated annual income (excluding property income)?

6. Do you intend to retain all properties or sell any of them in the not so distant future?

7. Do you own any property which has a significant capital gain?

8. Do you own any other rental property through a limited company, a limited liability partnership or trust?

9. Do you have any of the following losses brought forward from earlier years:

- a. Rental losses
- b. Capital losses

- If yes, please provide the amount of each loss brought forward

Property 6										
Property 7										
Property 8										
Property 9										
Property 10										

(Please insert rows as required for additional properties)