

Portfolio Buy to Let Landlord Requirements

1. Assets and Liability Schedule / Statement of Means

Borrower(s):

Date:

Assets

Main residential property £
 Other UK properties £
 Overseas property £
 Car(s) £
 Stocks and shares £
 Life policies (surrender values) £
 Endowments (surrender values) £
 Valuables (jewellery, antiques etc) £
 Cash (bank accounts etc) £
 Other investments £

Total Assets

£

Liabilities

Residential mortgage balance £
 Other UK mortgages balances £
 Overseas mortgages balances £
 Loans and overdrafts £
 Credit card balances £
 Other liabilities £

Total liabilities

£

OPEN 7 DAYS

Monday - Friday: 8am - 8pm • Saturday: 8am - 6pm • Sunday: 11am - 5pm
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Portfolio Buy to Let Landlord Requirements *(continued)*

2. Cashflow - Current

Income and Expenditure - Current

Monthly income		Monthly expenditure	
Rent received	£	Mortgage payments	£
Other income, e.g. salary, investments	£	Repairs and maintenance	£
		Letting agent fees	£
		Legal and accountant fees	£
		Travel expenses	£
		Ground Rent / Service Charges	£
		Insurance	£
		Council Tax	£
		Energy / Safety Tests	£
		Other expenditure	£
Total income	£	Total expenditure	£
Monthly surplus / deficit - Current	£		

3. Cashflow - Forecast

Income and Expenditure - Forecast

Monthly income		Monthly expenditure	
Rent received	£	Mortgage payments	£
Other income, e.g. salary, investments	£	Repairs and maintenance	£
		Letting agent fees	£
		Legal and accountant fees	£
		Travel expenses	£
		Ground Rent / Service Charges	£
		Insurance	£
		Council Tax	£
		Energy / Safety Tests	£
		Other expenditure	£
Total income	£	Total expenditure	£
Monthly surplus / deficit - Forecast	£		

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