



Designs on  
**PROPERTY**  
Passionate about homes



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## Property Investment Brief

This brief is purely for your own benefit to note down your thoughts on investing in property. You can however take it with you to any services such as a property consultant, letting agent, financial advisor, property tax consultant.

### **Please note:-**

Designs on Property Ltd is not regulated by the Financial Service Authority and as such, does not constitute financial advice. Any financial information should be checked with an Independent Financial Advisor and all information provided by Designs on Property Ltd are followed at your own risk and should include your own extensive research.

1. What are your key objectives for investing in Property?

For example, if 'income', how much per year/month, before or after tax? When by?

a. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

d. \_\_\_\_\_

e. \_\_\_\_\_

2. What other investments do you have?

	<b>Amount originally invested</b>	<b>Current Value</b>	<b>Expected Future</b>
<b>Value</b>			
<b>Stocks/Shares</b>			
<b>Bonds</b>			
<b>Pension 1</b>			
<b>Pension 2</b>			
<b>Other</b>			



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3. Do you currently have any property investments, including your own home? If yes, what are they?

**Original Purchase Price**

**Current Value**

**Future Value**

**Your own home**

**Current  
Property Portfolio**

4. Financial Questions

a. What is your current annual income, including bonuses? \_\_\_\_\_

b. What are your current outgoings? \_\_\_\_\_

c. Do you have any other debts? \_\_\_\_\_  
Eg HP/Credit Cards/loans

d. Do you have future financial commitments? \_\_\_\_\_  
For example, fund children through college

e. Are you able to cover your financial commitments  
if you/member of your family becomes sick/accident? \_\_\_\_\_

f. Have you prepared a will? \_\_\_\_\_

g. Do you have any children/dependents? \_\_\_\_\_

Have you made provision for their inheritance? \_\_\_\_\_



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## Property Investment Brief cont'd

5. How much money do you have to invest now and in the future (this could be equity/cash etc?)

Now:

Future (when and how much?)

6. How much time do you have to research property investments?

- a. Evenings and weekends
- b. Three to four days per week
- c. Holidays – if so, how many weeks per year?
- d. Full time investor (five days or more)

7. How much time do you have to manage property on an on-going basis?

- a. Evenings and weekends
- b. Three to four days per week
- c. Holidays – if so, how many weeks per year?
- d. Full time investor (five days or more)

8. How much risk are you willing to take, investing in property?

9. When and what is your exit strategy?



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## Other Notes