



Investment Checklist

Assess the yield, lettability and fabric of an investment property in a structured way

This practical guide helps you capture the key figures of an investment property and keep income, condition and documents in view. It allows you to assess a property objectively and to establish a sound basis for your investment decision.



INVESTMENT PROFILE AND PROPERTY TYPE

PROPERTY TYPE AND ANY COMMERCIAL SHARE

PREFERRED LOCATION, CENTRAL OR ON THE EDGE OF TOWN

NUMBER OF RESIDENTIAL UNITS AND PARKING SPACES

TARGET GROSS RENTAL YIELD

☐ Set the yield target with your tax adviser



RENTAL INCOME AND LETTING

CURRENT ANNUAL NET RENT

TENANT MIX AND NUMBER OF TENANCIES

START OF THE CURRENT TENANCY AGREEMENTS

SCOPE FOR FUTURE RENT ADJUSTMENTS

☐ Assess lettability at the location

☐ Record the current vacancy

☐ Ask about past rent arrears



CONDITION AND FABRIC

YEAR OF CONSTRUCTION OF THE BUILDING

AGE OF THE ROOF, WINDOWS AND HEATING

TYPE OF HEATING AND OTHER BUILDING SERVICES

MODERNISATIONS OVER THE PAST DECADE

☐ Look for damp and damage to the building fabric

☐ Check the age and safety of the electrical installation

☐ Assess the thermal insulation of the facade and roof

☐ Check for scope to extend and for listed-building status



DOCUMENTS AND EVIDENCE

☐ Current land register extract

☐ Official site plan, floor plans and living area calculation

☐ Valid Energy Performance Certificate (EPC)

☐ Information on building encumbrances and contaminated sites

☐ Proof of buildings insurance

☐ For a condominium: declaration of division, minutes and annual statements

LEVEL OF THE SERVICE CHARGE AND MAINTENANCE RESERVE



COSTS AND FINANCING

PURCHASE PRICE INCLUDING INCIDENTAL PURCHASE COSTS

CALCULATED COSTS FOR RENOVATION AND REPAIRS

PURCHASE PRICE FACTOR IN RELATION TO THE ANNUAL RENT

TOTAL INVESTMENT AMOUNT

☐ Provide the full set of documents to your financing partner

Note Please note down any open questions and observations from the viewing, so that we can consider them together.