

# ANNUAL PORTFOLIO REVIEW CHECKLIST FOR EACH PROPERTY

## RENT

WHEN WAS THE LAST INCREASE? DOES THE MARKET SUPPORT MORE?

## GROWTH

WHAT IS THE CURRENT VALUE OF THE PROPERTY?

## MORTGAGES

WHAT IS MY CURRENT MORTGAGE BALANCE?  
WHAT IS MY CURRENT INTEREST RATE?  
HOW MUCH LONGER OF THE FIXED TERM IS LEFT?  
IS IT NEARLY TIME TO REMORTGAGE?  
WILL I BORROW THE SAME AMOUNT OR TAP INTO MY EQUITY?

## INSURANCE

AM I HAPPY WITH MY LEVEL OF INSURANCE?  
WHEN IS IT DUE FOR RENEWAL?

## MAINTENANCE

ARE ANY REPAIRS OR UPDATES NEEDED?  
IS THERE ANY MAJOR CYCLICAL EXPENDITURE I NEED TO BUDGET FOR?

## ANY PROBLEMS?

AM I HAVING REPEATEDLY BAD TENANTS?  
AM I HAVING FREQUENT REPAIRS?  
IS IT REGULARLY HARD TO LET?

## THE BIG QUESTION

WOULD I BUY THIS PROPERTY AGAIN?



# ANNUAL PORTFOLIO REVIEW CHECKLIST FOR MY WHOLE PORTFOLIO

## MY TEAM

AM I HAPPY WITH MY:

MORTGAGE BROKER

LETTING AGENT

ACCOUNTANT (IF NOT, CONTACT [HTTPS://THEPROPERTYHUB.NET/TAX](https://thepropertyhub.net/tax))

INSURANCE BROKER

TRADESPERSON TEAM

## TAX

IS IT TIME TO SELL ANY PROPERTIES?

DO I NEED TO THINK ABOUT THE TIMING OF SALES TO MINIMISE TAX?

ARE THERE ANY SALES OR PURCHASES IN THE NEXT YEAR I SHOULD TALK TO MY ACCOUNTANT ABOUT?

## KEEPING UP TO DATE

AM I FOLLOWING THE RIGHT WEBSITES TO LEARN ABOUT LOCAL REGENERATION?

HAVE I SUBSCRIBED TO THE PROPERTY HUB MAGAZINE?  
([HTTPS://THEPROPERTYHUB.NET/MAGAZINE](https://thepropertyhub.net/magazine))

AM I FOLLOWING THE PROPERTY HUB ON SOCIAL MEDIA?

## FOLLOW US



[HTTPS://WWW.FACEBOOK.COM/PROPERTYHUBUK/](https://www.facebook.com/propertyhubuk/)



[HTTP://TWITTER.COM/PROPERTYHUBUK](http://twitter.com/propertyhubuk)



[HTTPS://WWW.INSTAGRAM.COM/PROPERTYHUBUK/](https://www.instagram.com/propertyhubuk/)