

# Assisted Acquisitions Programme

## Business Information Form\*

*In order to carry out a full valuation of your business, please complete the form below with as much detail as possible.*

Company Information			
Status: (Ltd Co / Partnership / Sole Trader)			
Reasons for selling:			
Trading start date:			
Timescale for selling:			
Financial year end:			
No. of Directors / Partners:			
Other Directorships			
Names of Directors / Partners:			
Name:	Age	% Share:	Working Hours:
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Name:	Age:	% Share:	Working Hours:

Financial Data (Please supply copies where possible)	
Turnover past 3 years	2021
	2022
	2023
Profit (EBITDA)	2021
	2022
	2023
% profit/turnover	
Exceptional Costs/Charges	
Price you would like to sell for	

Portfolio Income Breakdown	
Total fee income (last 12 months)	
Income from managed properties	
Number of Fully Managed properties	
Number of Rent Collect properties:	
Income from Let Only fees	
Income from Tenant Fees	
Income from Contractor Commission	
Income from Rent Protection	
Income from Financial Services	
Other	

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Portfolio	
Multiple Landlords (landlords with 5 or more properties only)	
Landlord 1	Fully Managed =
Landlord 2	Fully Managed =
Landlord 3	Fully Managed =
Landlord 4	Fully Managed =
Landlord 5	Fully Managed =
Landlord 6	
Overseas Landlords	
Student units	
Vendor owned properties	
Family / friend owned properties	
Do you offer Rent Protection to Fully Managed Landlords?	Supplier: Total Number of current policies:
HMO's (House of Multiple Occupation)	
Proportion of Housing Benefit	
Any tenants/properties with rent arrears?	
Is any of your portfolio within a selective licence area?	Area: Properties Managed:
Any serviced or guaranteed rent units	

Lettings Services, Fees and Schemes	
Which Deposit Scheme do you use?	
Who provides Client Money Protection?	
Are you a member of either of the following; ARLA, NALS, SAFE AGENT, TPO or other?	
Average Rent?	
Average management % fee?	
% of landlords with signed terms of business?	
What Software provider do you use? Jupix, Reapit, CFP, CARL?	
What % of tenants has signed tenancy agreements?	
What % of properties have a Gas Safety Certificate?	
What % of properties have an EICR?	
What % of properties have an EPC?	
What % of properties have an Inventory?	

Sales Summary	
Turnover for last 12 months?	

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Number of units?	
Copy of last 3 years accounts	
Current Pipeline Value?	
Current pipeline number of units?	
Total commission of instruction register?	
Agreed fee structure?	

### CRM Questions

Current CRM systems being used:	
Date first used:	
Length of contract remaining:	
Notice required to terminate contract (for information only):	
Legacy CRM system (if applicable):	
No of active tenancies on current CRM system:	
Do you have any active tenancies that are not on the CRM system as hard copy only?	
Current CRM system, does this hold all Landlord, Tenant, Property & Tenancy documents, e.g. attached the CRM records?	
If NO, where are the documents held? E.g. Shared drive	
Current CRM system – Are property photos held on this system and then upload to portals for available stock?	
If NO, where are the photos held? E.g. Shared drive	
If YES – are they saved/backed up anywhere else or only on the current CRM system?	

### IT Provider Details

What level of service do they provide? Laptops, desktops, Phone system?	
Type of phone system being used:	
Length of contract remaining:	
Notice required to terminate contract (for information only):	

### Staff Details

Staff Member 1	Job Title: Hours of Work: Basic Salary: On Target Earnings: Additional Benefits e.g. Car Allowance/Car? Length of Service:
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<b>Staff Member 2</b>	Job Title: Hours of Work: Basic Salary: On Target Earnings: Additional Benefits: Length of Service:
<b>Staff Member 3</b>	Job Title: Hours of Work: Basic Salary: On Target Earnings: Length of Service:
<b>Staff Member 4</b>	Job Title: Hours of Work: Basic Salary: On Target Earnings: Length of Service:
<b>Staff Member 5</b>	Job Title: Hours of Work: Basic Salary: On Target Earnings: Length of Service:

Premises and Key Assets	
<b>Is the Property registered in the name of the business?</b>	
<b>Address of Property</b>	
<b>Lease Expiry/Next Break Clause</b>	
<b>Rent</b>	
<b>Inside or Outside of Landlord and Tenant Act?</b>	
<b>Any Company Cars?</b>	