



# Questions your accountant will ask

- Are you buying alone or with a spouse?
- What income do you (each) earn?
- Will you be involved in any joint ventures external to your direct family?
- How many years will it be until you plan to stop paid work?
- How much capital do you plan to invest in property now, and in the future?
- Is your capital coming from personal funds (savings/inheritance etc) or business profits?
- Will you be using mortgages?
  - Do you know roughly what amount of leverage you plan to use?

# Questions your accountant will ask

- What's your current best guess about the total number of / value of properties you'll end up acquiring?
- Are you planning to invest in single lets, HMOs, holiday lets, commercial?
- Are these long-term investments or do you plan to trade (flip / buy-to-sell) any properties?
- Will you be needing the income from your portfolio to fund your day-to-day expenses?
- Do you have / plan to have children you'll want to pass your portfolio on to?
- How important is legacy planning to you?
- Do you have savings in a personal pension plan which you would like to use and invest?