Beat The Property Agent

Leasehold Property Information Questionnaire

Know What You're Selling/Buying.

Buying a leasehold property is different from buying a freehold property.

You are purchasing the right to occupy and use the property for the remaining term of a lease, subject to the rights, responsibilities, restrictions, charges and obligations contained within that lease.

That can affect:

- what the property costs you to own
- what you can do with it
- who is responsible for maintaining different parts of the building
- whether you can let the property
- whether you can keep pets
- whether alterations require permission
- your contribution towards repairs and major works
- your ability to obtain a mortgage
- the property's future saleability

The BTPA Blueprint™ is designed to bring this information forward.

Instead of waiting until conveyancing is well underway to discover important leasehold information, BTPA encourages sellers to gather it before the property is marketed and buyers to understand it before committing to the purchase.

This questionnaire does not replace the lease, LPE1, management pack, conveyancing process or independent legal advice. Information supplied by a seller should be checked against the relevant legal and management documentation by the buyer's conveyancer.

PART 1 — THE LEASE

1. Lease Details

1.1 Is the property leasehold?

- [ ] Yes
- [ ] No
- [ ] Share of freehold
- [ ] Commonhold
- [ ] Shared ownership
- [ ] Other
- [ ] Unknown

1.2 Original length of the lease:

_____

years

1.3 Lease commencement date:

_____

1.4 Lease expiry date:

_____

1.5 Approximate number of years remaining:

years

1.6 Is a copy of the lease available?

- [ ] Yes — uploaded
- [ ] Yes — to follow
- [ ] No
- [ ] Unknown

1.7 Has the lease ever been extended, varied or amended?

- [ ] Yes
- [ ] No
- [ ] Unknown

If yes, provide details and supporting documents.

1.8 Is a lease extension currently underway or being considered?

- [ ] Yes
- [ ] No

If yes, provide details.

> BTPA BUYER CHECK
> The remaining lease term can affect mortgage availability, property value and future saleability.
> Your conveyancer should confirm the exact unexpired term and explain the implications of the lease to you.

PART 2 — THE FREEHOLDER & MANAGEMENT

2. Who Manages the Building?

2.1 Name of freeholder/landlord:

2.2 Freeholder contact details:

2.3 Is there a managing agent?

- [ ] Yes
- [ ] No

If yes:

Managing agent:

Contact details:

2.4 Is there a Residents' Management Company (RMC)?

- [ ] Yes
- [ ] No
- [ ] Unknown

2.5 Is there a Right to Manage (RTM) company?

- [ ] Yes
- [ ] No
- [ ] Unknown

2.6 Does ownership of the property include a share or membership in a management/freehold company?

- [ ] Yes
- [ ] No
- [ ] Unknown

If yes, provide details.

2.7 Is there an active residents' or leaseholders' association?

- [ ] Yes
- [ ] No
- [ ] Unknown

2.8 Are there any known current disputes between leaseholders and the freeholder, managing agent or management company?

- [ ] Yes
- [ ] No
- [ ] Unknown

If yes, provide details.

PART 3 — GROUND RENT

3. Ground Rent

3.1 Is ground rent payable?

- [ ] Yes
- [ ] No
- [ ] Peppercorn/£0
- [ ] Unknown

3.2 Current annual ground rent: (£)

3.3 When is it payable?

- [ ] Annually
- [ ] Six-monthly
- [ ] Quarterly
- [ ] Other

3.4 Is the ground rent currently paid up to date?

- [ ] Yes
- [ ] No
- [ ] Unknown

3.5 Does the ground rent increase during the lease?

- [ ] Yes
- [ ] No
- [ ] Unknown

3.6 If yes, how is the increase calculated?

3.7 How frequently is it reviewed or increased?

3.8 Date of next review:

> **BTPA BUYER CHECK**
>
> Do not look only at today's ground rent.
>
> Your conveyancer should establish whether it can increase, how the increase is calculated and whether the terms could affect mortgageability or future saleability.

PART 4 — SERVICE CHARGES

4. What Does the Building Cost to Run?

4.1 Current annual service charge: (£)

4.2 What period does this figure relate to?

4.3 What does the service charge include?

Select all that apply:

- [ ] Buildings insurance
- [ ] Cleaning
- [ ] Gardening/grounds maintenance
- [ ] Communal electricity
- [ ] Communal heating
- [ ] Lift maintenance
- [ ] Door entry/security
- [ ] Concierge
- [ ] Management fees
- [ ] Window cleaning
- [ ] Roof/exterior maintenance
- [ ] Communal repairs
- [ ] Fire safety systems
- [ ] Other: _____

4.4 Please provide the service charge for the previous three financial years, where available.

Year 1: (£)

Year 2: £_____ Year 3: £_____

4.5 Has the service charge increased significantly during your ownership?

- [ ] Yes
- [ ] No

If yes, explain why if known.

4.6 Are all service charge payments currently up to date?

- [ ] Yes
- [ ] No
- [ ] Unknown

4.7 Is there currently any service charge deficit, balancing charge or additional payment due?

- [ ] Yes
- [ ] No
- [ ] Unknown

If yes: (£)

Details:

4.8 Are the latest service charge accounts available?

- [ ] Yes — uploaded
- [ ] To follow
- [ ] No

4.9 Is the current service charge budget available?

- [ ] Yes — uploaded
- [ ] To follow
- [ ] No

> BTPA BUYER CHECK
> A service charge of £2,000 tells you very little on its own.
> Look at what it covers, how it has changed and whether additional expenditure is anticipated.
> Your conveyancer should verify the figures against the management information supplied during the transaction.

PART 5 — RESERVE / SINKING FUND

5. Preparing for Future Costs

5.1 Does the building have a reserve or sinking fund?

- [ ] Yes
- [ ] No
- [ ] Unknown

5.2 Current balance of the fund, if known: (£)

5.3 Does your service charge include a contribution to the fund?

- [ ] Yes
- [ ] No
- [ ] Unknown

5.4 Current annual contribution: (£)

5.5 Are there known plans to use a substantial part of the fund?

- [ ] Yes
- [ ] No
- [ ] Unknown

If yes, explain:

> BTPA BUYER CHECK
>
> A reserve or sinking fund can help meet the cost of substantial future works, but the existence of a fund does not mean it will necessarily cover the whole cost.
>
> Ask your conveyancer to establish what is held, what it may be used for and whether major expenditure is anticipated.

PART 6 — MAJOR WORKS

6. Could a Large Bill Be Coming?

6.1 Have major works been carried out during the seller's ownership?

- [ ] Yes
- [ ] No

If yes:

What work?

When?

Seller's contribution: (£)

6.2 Are any major works currently underway?

- [ ] Yes
- [ ] No
- [ ] Unknown

6.3 Are any major works planned, proposed, discussed or anticipated?

- [ ] Yes
- [ ] No
- [ ] Unknown

If yes:

Description:

Estimated timing:

Estimated contribution for this property: (£)

6.4 Have any Section 20 notices or consultation documents been received?

- ☐ Yes
- ☐ No
- ☐ Unknown

If yes, upload/provide copies.

6.5 Are there any major works which have been completed but have not yet been fully invoiced to leaseholders?

- ☐ Yes
- ☐ No
- ☐ Unknown

6.6 Are there long-term maintenance plans for the building?

- ☐ Yes
- ☐ No
- ☐ Unknown

If available, upload them.

> **BTPA BUYER ALERT**
>
> This is one of the most important sections of a leasehold purchase.
>
> A relatively affordable annual service charge does not necessarily mean there are no substantial future costs.
>
> Your conveyancer should establish whether major works are proposed and whether you could become responsible for contributions after completion.

PART 7 — BUILDING SAFETY

7. Building & Fire Safety

7.1 How many storeys does the building have?

7.2 Approximate building height, if known:

metres

7.3 Does the building have an external wall system/cladding?

- ☐ Yes
- ☐ No
- ☐ Unknown

7.4 If applicable, is an EWS1 form available?

- [ ] Yes
- [ ] No
- [ ] Not applicable
- [ ] Unknown

7.5 Have any fire or building safety defects been identified?

- [ ] Yes
- [ ] No
- [ ] Unknown

7.6 Have remediation works been completed?

- [ ] Yes
- [ ] No
- [ ] In progress
- [ ] Not applicable

7.7 Are further remediation works planned?

- [ ] Yes
- [ ] No
- [ ] Unknown

7.8 Could the incoming leaseholder be liable for any building safety or remediation costs?

- [ ] Yes
- [ ] No
- [ ] Unknown

If yes, estimated amount if known: (£)

7.9 Are current fire risk/building safety documents available?

- [ ] Yes
- [ ] No
- [ ] Unknown

7.10 Where applicable, have details of the Principal Accountable Person/Accountable Person been provided?

- [ ] Yes
- [ ] No
- [ ] Not applicable
- [ ] Unknown

BTPA BUYER CHECK

Building safety legislation is complex and the financial protections available to individual leaseholders depend upon the circumstances.

Your conveyancer should specifically investigate building safety before you commit to the purchase.

PART 8 — BUILDINGS INSURANCE

8. Insurance

8.1 Who arranges the buildings insurance?

- [ ] Freeholder
- [ ] Management company
- [ ] Managing agent
- [ ] Leaseholder
- [ ] Other
- [ ] Unknown

8.2 Is the premium included within the service charge?

- [ ] Yes
- [ ] No
- [ ] Unknown

8.3 Annual insurance contribution for this property, if separately identifiable: (£)

_____

8.4 Is the current insurance schedule/policy available?

- [ ] Yes
- [ ] No

8.5 Has the building experienced unusually large premium increases, excesses, exclusions or special conditions?

- [ ] Yes
- [ ] No
- [ ] Unknown

If yes, provide details.

8.6 Has buildings insurance ever been refused, withdrawn or significantly restricted?

- [ ] Yes
- [ ] No
- [ ] Unknown

PART 9 — LEASE RESTRICTIONS

9. What Can You Actually Do With the Property?

To the seller's knowledge, does the lease restrict or require consent for any of the following?

Pets

- [ ] Allowed
- [ ] Consent required
- [ ] Prohibited
- [ ] Unknown

Subletting

- [ ] Allowed
- [ ] Consent required
- [ ] Prohibited
- [ ] Unknown

Short-term/Holiday Letting

- [ ] Allowed
- [ ] Consent required
- [ ] Prohibited
- [ ] Unknown

Running a Business From Home

- [ ] Allowed
- [ ] Restricted
- [ ] Prohibited
- [ ] Unknown

Internal Alterations

- [ ] Allowed
- [ ] Consent required
- [ ] Restricted
- [ ] Unknown

Structural Alterations

- [ ] Allowed
- [ ] Consent required
- [ ] Prohibited
- [ ] Unknown

Replacement Windows/Doors

- [ ] Allowed
- [ ] Consent required
- [ ] Restricted
- [ ] Unknown

Flooring

Are there restrictions concerning hard flooring, carpets or sound insulation?

- [ ] Yes
- [ ] No
- [ ] Unknown

Satellite Dishes/Aerials

- [ ] Allowed
- [ ] Consent required
- [ ] Prohibited
- [ ] Unknown

EV Chargers

- [ ] Allowed
- [ ] Consent required
- [ ] Restricted
- [ ] Unknown

Parking

Are there restrictions affecting vehicles or parking?

- [ ] Yes
- [ ] No
- [ ] Unknown

Other Restrictions

> **BTPA BUYER CHECK**
>
> Never assume you can use a leasehold property exactly as you wish.
>
> If something matters to you — your dog, renting the property, changing the layout, installing flooring or working from home — raise it with your conveyancer before committing to the purchase.

PART 10 — ALTERATIONS & CONSENTS

10. Has the Property Been Changed?

10.1 Have alterations been made during the seller's ownership?

- [ ] Yes
- [ ] No

If yes, describe:

10.2 Did the lease require freeholder/landlord consent?

- [ ] Yes
- [ ] No
- [ ] Unknown

10.3 Was consent obtained?

- [ ] Yes
- [ ] No
- [ ] Not applicable
- [ ] Unknown

10.4 Are licences for alterations or written approvals available?

- [ ] Yes — uploaded
- [ ] No
- [ ] Not applicable

10.5 Were any planning/building regulation approvals also required?

- [ ] Yes
- [ ] No
- [ ] Unknown

If yes, are they available?

- [ ] Yes
- [ ] No

PART 11 — PARKING, STORAGE & COMMUNAL AREAS

11. What's Included?

11.1 Does the property include an allocated parking space?

- [ ] Yes
- [ ] No

11.2 Is the parking space legally included within the lease/title?

- [ ] Yes
- [ ] No
- [ ] Unknown

11.3 Is parking subject to a permit or additional charge?

- [ ] Yes
- [ ] No

Annual charge: (£)

11.4 Does the property include storage?

- [ ] Yes
- [ ] No

If yes, describe:

11.5 Does the property have rights to use communal areas or facilities?

- [ ] Gardens
- [ ] Gym
- [ ] Concierge
- [ ] Bike store
- [ ] Bin store
- [ ] Roof terrace
- [ ] Residents' lounge
- [ ] Other: _____

11.6 Are any additional charges payable for these facilities?

- [ ] Yes
- [ ] No

Details: _____

PART 12 — COMMUNAL SERVICES

12. Shared Systems

12.1 Is there communal heating or hot water?

- [ ] Yes
- [ ] No

12.2 Can the leaseholder choose their energy provider?

- [ ] Yes
- [ ] No
- [ ] Not applicable

12.3 How is communal energy charged?

12.4 Is it included within the service charge?

- [ ] Yes
- [ ] No

12.5 Are there communal lifts?

- [ ] Yes
- [ ] No

12.6 Are there communal security/access systems?

- [ ] Yes
- [ ] No

12.7 Are there any other communal services a buyer will be required to pay towards?

PART 13 — DISPUTES, BREACHES & COMPLAINTS

13. Anything a Buyer Should Know?

13.1 Has there been a dispute with the freeholder?

- ☐ Yes
- ☐ No

13.2 Has there been a dispute with the managing agent or management company?

- ☐ Yes
- ☐ No

13.3 Has there been a dispute involving another leaseholder or neighbour?

- ☐ Yes
- ☐ No

13.4 Has the seller received notification of an alleged breach of the lease?

- ☐ Yes
- ☐ No

13.5 Are any lease breaches currently unresolved?

- ☐ Yes
- ☐ No
- ☐ Unknown

13.6 Are any service charge, ground rent or administration charge disputes unresolved?

- ☐ Yes
- ☐ No

If yes to any question, provide details and supporting documents.

PART 14 — NOTICES

14. Notices Affecting the Property or Building

Has the seller received or been made aware of any:

- [ ] Section 20 consultation notices?
- [ ] Major works notices?
- [ ] Building safety notices?
- [ ] Fire safety notices?
- [ ] Remediation notices?
- [ ] Notices requiring repairs?
- [ ] Breach notices?
- [ ] Planning notices affecting the building?
- [ ] Notices concerning the management of the building?
- [ ] Other legal or statutory notices?
- [ ] Yes
- [ ] No
- [ ] Unknown

If yes, provide details and copies.

PART 15 — COST OF OWNERSHIP

15. Make the Real Cost Visible

BTPA should automatically calculate this section from information entered elsewhere.

Annual ground rent: (£)

Annual service charge: (£)

Separate buildings insurance: (£)

Parking charge: (£)

Other compulsory annual charges: (£)

Estimated Regular Annual Leasehold Cost

£_____ per year

Approximate Monthly Equivalent

£_____ per month

This figure excludes mortgage payments, council tax, utilities, contents insurance and unexpected expenditure unless specifically stated.

Known Additional/Future Costs

Major works currently identified: (£)

Other known one-off charges: (£)

PART 16 — DOCUMENT READINESS

16. Seller's Leasehold Document Checklist

Please indicate which documents are available.

- [ ] Copy of lease
- [ ] Lease variations/deeds of variation
- [ ] Lease extension documents
- [ ] Latest ground rent demand
- [ ] Latest service charge demand
- [ ] Previous service charge accounts
- [ ] Current service charge budget
- [ ] Reserve/sinking fund information
- [ ] Managing agent details
- [ ] Freeholder details
- [ ] Management company information
- [ ] Buildings insurance schedule
- [ ] Major works information
- [ ] Section 20 notices
- [ ] Fire/building safety documentation
- [ ] EWS1, where applicable
- [ ] Alteration licences/consents
- [ ] Parking documentation
- [ ] Relevant guarantees/warranties
- [ ] Notices affecting the property
- [ ] Other relevant leasehold documentation

PART 17 — BTPA LEASEHOLD SNAPSHOT™

This is the information I would show prominently on the property listing, rather than making buyers search through documents for it.

Leasehold at a Glance

Lease remaining:

years

Ground rent: (£)

per year

Ground rent review:

Service charge: (£)

per year

Previous service charge: (£)

Reserve/sinking fund: Yes / No / Unknown

Known major works: Yes / No / Unknown

Estimated known contribution: (£)

Managing agent:

Building insurance included: Yes / No / Unknown

Building safety information: Available / Pending / N/A

Lease restrictions identified: Yes / No

Lease uploaded: Yes / Pending

Management information: Available / Pending

PART 18 — BUYER UNDERSTANDING

Before proceeding, the buyer should be encouraged to confirm:

- [ ] I understand how many years remain on the lease.
- [ ] I understand the current ground rent and whether it can change.
- [ ] I understand the current service charge.
- [ ] I have been shown how the service charge has changed where historic information is available.
- [ ] I understand what the service charge pays for.
- [ ] I understand whether there is a reserve/sinking fund.
- [ ] I have been informed of known or proposed major works.
- [ ] I understand that future service charges and major works costs may change.
- [ ] I have reviewed the disclosed lease restrictions relevant to how I intend to use the property.
- [ ] I understand who manages the building.
- [ ] I have considered the available building and fire safety information.
- [ ] I understand that information provided by the seller/BTPA does not replace my conveyancer's legal investigation.
- [ ] I will ask my conveyancer to explain the lease, title, management information and financial liabilities before I become legally committed.

THE BTPA BLUEPRINT™ PRINCIPLE

Don't Discover It Halfway Through the Transaction.

Lease length. Service charges. Ground rent. Major works. Building safety. Restrictions. Management. Future liabilities.

These shouldn't emerge as surprises weeks or months after a buyer has made an offer.

Prepare it. Disclose it. Understand it. Then proceed.

Your Property. Your Rules. Your Way.

Important Information

The BTPA Blueprint™ Leasehold Property Information & Buyer Readiness Questionnaire is designed to support early property preparation, disclosure and consumer understanding.

It is not a legal report on title, legal advice, financial advice, valuation, building survey or substitute for the conveyancing process.

Information supplied by sellers, freeholders, managing agents or other third parties should be independently verified where appropriate.

Buyers should instruct a qualified conveyancer to review the lease, title, management information, building safety information and all financial obligations associated with a leasehold property before becoming legally committed

to the purchase.