Checklist | Portfolio review

Stay ahead of the changes with this simple, practical checklist designed to help you review your current landlord portfolio before the Renters' Rights Act comes into force. Use our easy-to-complete template to identify what needs updating or monitoring, keep your records organised, and ensure you stay fully compliant.

1 | Tenancy Overview

- Current tenancy start date: _____
- Renewal date: _____
- Agreement type:
  - Fixed Term ☐
  - Rolling Contract ☐
- If fixed term, how long is the fixed term agreement set for?:
  - 6 months ☐
  - 12 months ☐
  - 18 months ☐
  - 24 months ☐
- Tenancy type:
  - AST ☐
  - Company Let ☐
  - Student Let ☐
  - Other ☐

  (please specify)

  ☐
- Does the tenancy agreement reference Section 21?:
  - Yes ☐
  - No ☐
- Is there a superior lease?:
  - Yes ☐
  - No ☐

2 | Rent And Terms

- Current rental amount per month (£): _____
- How often is the rent paid?
  - Weekly ☐
  - Bi-Weekly ☐
  - Monthly ☐
  - Rent was paid up-front for tenancy term ☐
- Rent review due date: _____
- Date last rent review completed: _____

NOTE

Any clauses that won't be valid under the Act (for additional support on what clauses won't be valid read our infosheet on the changes).

3 | Pets And Tenant Requests

- Has the tenant requested a pet during their tenancy term?
  - Yes ☐
  - No ☐
- The outcome of this request:

- Landlord response:

- Is Tenants Home Insurance in place?
  - Yes ☐
  - No ☐
- If yes, who is the insurance provider?

- Is additional Pet Damage Protection available on this policy?
  - Yes ☐
  - No ☐

TOP TIP

Ensure you have created a process for reviewing future requests within 28 days for all tenancies.

4 | Rent Arrears And Risk Protection

Has the tenant fallen into rent arrears during the tenancy term?

Yes ☐
No ☐

If yes, what was the outcome?

Is Rent and Legal Protection in place?

Yes ☐
No ☐

If yes, who is the insurance provider?

5 | Landlord Intentions And Property Continuity

Which of the following best describes the landlord:

Portfolio landlord ☐
Accidental landlord ☐
Short – term landlord ☐
Other ☐
(please specify)

Has the landlord suggested they may reclaim the property in the future?

Yes ☐
No ☐

When is the property expected to be mortgage free?: _____

Note any terms within the mortgage that may conflict with periodic tenancy obligations:

6 | Deposits And Guarantors

Is the deposit registered within scheme limits?

Yes ☐
No ☐

Has the tenant got a guarantor?

Yes ☐
No ☐

If yes, is the guarantor a personal or professional guarantor?

Personal ☐
Professional ☐