

## **Investment Strategy - Proforma for Discussion on Potential Purchase of a Property Asset**

The following information relates to a potential opportunity for purchase of an asset, prior to a submission of a bid.

**Overview of property to be considered:** (To include an overview of the property including current use, location (link to suitable location map), any photographs or marketing material available, estimated current value plus current usage)

**Links to Council's strategic plans, programmes or other investments:**

**Initial Valuation and areas of potential financial investment that may be required:**

(View on guide price, likely fees and additional work that may need to be carried out to complete due diligence. Plus any additional costs other than initial purchase that may be required to maximise investment)

**Any other relevant information or risks:**

Name of Officer Completing proforma:

Date:

Initial Scoring Matrix: (see separate excel sheet for more detail)

<b>Scoring Criteria</b>	<b>Unweighted score (0-4)</b>	<b>Weighted Score (Total out of 440)</b>	<b>Reason for score selection</b>
Location			
Tenancy			
Tenure			
Weighted Average Unexpired Lease Term			
Repairing Terms			
Profile			
Management resources			
<b>Total</b>			
<b>Percentage</b>			

**Post Meeting Summary:**

Meeting date:

Agreement to proceed and reasons for decision

Next Steps including timeline and due diligence to be completed: