



SSAS

SMALL SELF ADMINISTERED PENSION SCHEME

PROPERTY / LAND QUESTIONNAIRE

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investAcc

Pension Administration Limited

Scheme Information

Scheme Name

Property Information

Property Address	
	Postcode
Property Description (eg. Office, Warehouse etc)	

Please state whether the premises are: Freehold Leasehold

If **Leasehold**, please state outstanding terms of lease:

years

Annual ground rent (if applicable) £	Approximate age of property years
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Purchase price (excluding VAT) £
VAT (if applicable) £
Total Purchase £

Proposed date of exchange of contracts or completion:

Is the Property to be opted to Tax?

Yes No

Who will carry out VAT registration?

Is the purchase to be treated as a transfer of a Going Concern?

Yes No

Do you want InvestAcc Pension Administration Limited to arrange Buildings Insurance on behalf of the Scheme?

Yes No

Note: Buildings Insurance must be in place as at the date of completion.

Does the property include living accommodation from which a member may benefit?

- Yes No

Unusual provisions (if known) eg. options, rights etc.

Lease Information

Existing Lease (where the property is already let and the Lease is to continue after the purchase):

Tenant			
Address			
			Postcode
Rent Amount (per annum) £	Frequency of Payment	Start Date of Lease	End Date of Lease

Is the Tenant connected to the Sponsoring Employer or any of the Members?

- Yes No

Copy of the Lease attached or supplied previously?

- Yes No

New Lease

Proposed Tenant(s)			
Full Name(s)			
Address			
			Postcode
Rent Amount (per annum) £	Frequency of Payment	Start Date of Lease	End Date of Lease

Is the Tenant connected to the Sponsoring Employer or any of the Members?

- Yes No

Environmental Risk

Nature of existing or proposed Tenant's activities (if known):

Nature of previous Tenant's activities (if known):

Are the proposed activities of any previous Tenant's activities likely to have any environmental/contamination impact?

Yes No

Are there any known claims or incidents of an environmental nature in respect of the property or any surrounding property?

Yes No

If yes, to either question please give any details available

Vendor's Details

Vendor's Full Name

Address

Postcode

Telephone

Vendor's Solicitor's details

Vendor's Solicitor's name

Address

Postcode

Telephone

Please confirm if the vendor is connected to any scheme member?

Yes No

If 'Yes' and Vendor is also the Principal Employer is it intended that this is treated as an employer contribution?

Yes No

Does any Scheme member own the property?

- Yes No

If 'Yes' do you intend the purchase to be a contribution?

- Yes No

Please give details of contributions (if any):

Borrowing

(no more than 50% of net asset value of the scheme)

Is Borrowing required?

- Yes No

If 'Yes' please complete the following section:

Lender		
Contact Name		
Address		
		Postcode
Telephone	Amount of Loan £	Term

Funds will be provided from the following sources:

Source	Amount

Solicitor

InvestAcc Pension Administration Limited may appoint a solicitor with relevant expertise to act on behalf of the Scheme in connection with the purchase or alternatively you may appoint your own solicitor to act.

Do you want InvestAcc Pension Administration Limited to appoint a solicitor? Yes No

If no, please provide solicitor details:

Solicitor Name	
Address	
	Postcode
Contact Name	
Telephone	Email

Survey

An RICS qualified surveyor should be appointed to provide an open market capital valuation and rental valuation of the proposed property. InvestAcc Pension Administration Limited may appoint an appropriately qualified firm or alternatively you may appoint your own.

Have you already obtained a valuation? Yes No

If yes, please provide a copy, **If no**,

Do you want InvestAcc Pension Administration Limited to appoint a surveyor? Yes No

If no, please provide surveyor details:


Name	
Address	
	Postcode
Telephone	

Legal

1. I/we request the acquisition of the property as an investment by my/our pension scheme.
2. Once purchased the Trustees will be sole legal owner of the property and that any proposed works to the property must be approved prior to commencement.
3. Please instruct solicitor/my own solicitors to act on behalf of the pension scheme (delete as appropriate).
4. I confirm that the solicitor's point of contact will be
(member trustee)/my financial adviser/other (please specify)
If not specified we will assume the first named trustee.
5. We acknowledge and accept that all costs associated with the property will be the responsibility of the pension scheme and the costs thereof will be payable whether the proposed purchase completes or not.

Signed: (all Trustees to sign)

Signature	Date
Signature	Date
Signature	Date
Signature	Date



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InvestAcc Pension Administration Limited is authorised and regulated by the Financial Services Authority.
InvestAcc Pension Administration Limited is registered in England and Wales. Company number 7118349.
InvestAcc Pension Trustees Limited is registered in England and Wales, Company number 2875892.

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