



SSAS

SMALL SELF ADMINISTERED PENSION SCHEME

PROPERTY QUESTIONNAIRE - TAKEOVER

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Pension Administration Limited

Transfer of Property on Takeover of Existing Small Self Administered Scheme

Scheme Name

Property Information:

Property Address	
	Postcode
Property Description (eg. Warehouse, Development Land, Offices etc)	

Please state whether the premises are: Freehold Leasehold

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

years

Annual ground rent (if applicable) £	Current Value £	Approximate age of property years
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Is the Property opted to Tax?

Yes No

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

Yes No

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

Existing Lease (where the property is already let):

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

Is the Tenant also a Trustee of the Scheme: Yes No

Note: Please provide a copy of the Lease.

Environmental Risk

Nature of existing Tenant's Activities
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Are the proposed activities or 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
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Borrowing

Is there any outstanding borrowing against the property?

Yes No

Lending Source		
Address		
		Postcode
Telephone	Amount of Loan Outstanding £	Term remaining on loan years

Note: Please provide a copy of the Agreement.

Solicitor

InvestAcc Pension Administration Limited may appoint a solicitor with relevant expertise to act on behalf of the Pension Scheme in connection with the transfer of the ownership of the property, removing the existing Professional Trustee from the land registry and appointing InvestAcc Pension Trustees Limited as co-owner, 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
Telephone	

Legal

1. I/we request the transfer of the Property as an investment by my/our pension scheme
2. Please instruct solicitor/my own solicitors is to act on behalf of the pension scheme (delete whichever does not apply).
3. I confirm that the solicitor's point of contact will be myself/my financial adviser/other (please specify). If not specified we will assume that it is yourself.
4. In the event of a transfer of property on behalf of a scheme with more than one Trustee we nominate as the point of contact.
5. We acknowledge and accept that all costs associated with the property will be the responsibility of the pension scheme.

Signed: (all Trustees to sign)

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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