



Property Purchase Questionnaire

Scheme Name:	
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Section 1 - Property Details

Address of Property:	
Description of Property:	
Purchase Price:	£
Tenure:	Freehold/Leasehold* (*please attach copy lease)
Name of Vendor:	
Is the Vendor Connected? (see notes)	YES / NO
Is any part of the property suitable for use as or is your intention to use any part of the property as residential?	YES* / NO (*please supply details)
Do you or does anyone connected to you own any land or property adjacent to/attached to the land/property?	YES* / NO (*please supply details)
Are there any other details we should be aware of (e.g. restrictive covenants, options, rights of access etc)?	YES* / NO (*please attach details)

Section 2 - VAT

Is the Purchase subject to VAT?	YES / NO* (*go to section 3)
Who will register the Scheme for VAT?	Westerby Trustee Services Ltd / Member Trustee(s) / Accountant / Other
Will this be a Transfer of Going Concern?	YES / NO

Section 6 - Professional Advisors

Name and Address of Solicitor:	
Name and Address of Surveyor:	
Name and Address of Lender:	
Name & Address of Accountant: (if applicable for VAT)	

Section 7 - Funding Check

Estimated Costs:		Funded By:	
Purchase Price	£	Current Liquidity in scheme:	£
VAT	£	Encashment of current assets:	£
Stamp Duty	£	Additional Contribution:	£
Estimated Legal Fees:	£	Transfers from other providers:	£
Lenders fee (if known):	£	Commercial Mortgage:	£
Westerby Trustee Services Fee:	£		
Environmental Site Check Fee	£		
Total Cost:	£	Total Funds Available:	£

Section 8 – Further Information

Use this space to provide any further details requested above. Continue on a separate sheet if necessary

Declaration

- a) I / We confirm that the above information is full and correct and request the acquisition of the above property as an investment by my / our pension scheme.
- b) I / We confirm that we have read and agree to be bound by Westerby Trustee Services Ltd Property Purchase Guidelines.
- c) I / We request and authorise Westerby Trustee Services Ltd to appoint the professional advisors detailed above to act for the Trustees and acknowledge that all costs will be payable by the pension scheme.
- d) I / We understand that if the property purchase does not proceed for any reason that Westerby Trustee Services Ltd property purchase fee is payable in full and if there are insufficient monies in the fund, then I/we acknowledge that all fees and costs incurred will be met by me / us personally.

All Members to sign below:

Name: Signed: Date:

Name: Signed: Date:

Name: Signed: Date:

Name: Signed: Date:

Notes

1. Connected persons include:
 - Spouse or civil partner.
 - All ancestors and lineal descendants (parents grandparents, children, grandchildren etc)
 - Relatives/family members (siblings, aunts, uncles, in laws).
 - Relatives/family members of the member's spouse or civil partner, the spouse or civil partner of a relative, and the spouse or civil partner of a relative of the member's spouse or civil partner.
 - Business partners/associates.
2. A connected company is any company of which you (or any of the persons detailed in 1. above) either alone or **in association with other connected individuals** has control. (Control in this instance is as defined in section 416 of the Income & Corporation Taxes Act 1988 that is say own 20% or greater of the issued share capital or voting rights). This may include any company of which you (or any of the persons detailed in 1. above) are a director or shareholder and we will need to full details of the Directorships and shareholdings in order to investigate whether a company is connected.