



## Property Purchase Questionnaire

<b>Scheme Name</b>	
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### Property Details

<b>Property Description</b> (warehouse, development land, shop etc)	
<b>Is it Freehold or leasehold</b>	
<b>If leasehold, please state length of term</b>	
<b>Will this be a Transfer of Going Concern</b>	YES / NO
<b>Does the property include living accommodation</b>	YES / NO
<b>Any unusual provisions</b> (Options, rights of access etc)	

### Transaction Details

<b>Proposed Exchange/Completion date:</b>	
<b>Name of Vendor</b>	
<b>Is the Vendor Connected?</b> <ul style="list-style-type: none"><li>If yes, independent valuation required</li></ul>	
<b>Property Address</b>	
<b>Solicitors Details</b>	
<b>Lenders Details</b>	
<b>Name of Tenant</b>	
<b>Is the Tenant connected</b> (If yes, an independent rental valuation will be required)	YES / NO
<b>Annual Rental &amp; term of lease</b>	

### Joint Purchases

<b>Name of the Joint Purchaser</b>	
<b>What is the connection to the scheme</b>	
<b>Will the joint purchaser be borrowing to fund the purchase</b>	

## Funding Details

Property Details	
Property Value	£
Is VAT Payable on the purchase?	Yes / No
Amount of Commercial Mortgage required?	£
Lenders fee (if known)	£
Estimated Legal Fees	£

Joint Purchases	
Is this a joint purchase?	Yes / No
Percentage scheme is purchasing	%
Name of Joint Purchaser	
Is the joint purchaser connected	Yes / No

Funded By	
Commercial Mortgage (max 50% of Scheme Value)	£
Transfers from other providers	£
Encashment of current assets	£
Additional Contribution	£
Current Liquidity in scheme	£

## Development Work

<b>Are you intending to develop the property</b> (Note all work must be invoiced to and paid for by the pension fund not you personally or your company. Contributions may be paid to the fund subject to the usual limits. The trustees may borrow money to fund work subject to a maximum overall borrowing of 50% of net scheme assets).	YES / NO
<b>If yes, please provide basic details</b>	
<b>What is the proposed timescale</b>	
<b>What is the estimated cost of the work</b>	

## Document Checklist

Property Questionnaire	<input type="checkbox"/>	Copies of existing leases	<input type="checkbox"/>
Valuation Report	<input type="checkbox"/>	Head lease if leasehold	<input type="checkbox"/>

## Declaration

- I / We request the acquisition of the above property as an investment by my / our pension scheme.
- If the property purchase for whatever reason does not proceed and if there are insufficient monies in my fund, then I acknowledge that any fees or costs incurred will be met by me / us personally

## All Members to sign below:

Name of Client ..... Signed .....

Name of Client ..... Signed .....

Name of Client ..... Signed .....

Name of Client ..... Signed .....