

Premier SSAS

Property Questionnaire



For Trustees intending to
purchase Commercial Property
or Land through a Premier SSAS

Scheme Information

Scheme Name

Reference Number

Solicitor Details

Contact Name

Company

Address

 Postcode

E-Mail Address

Telephone Number

Facsimile Number

Property Information

Property address

 Postcode

Property description
(e.g. warehouse, offices etc)

Is the property registered at the Land Registry? *Tick as appropriate.* Yes No

Title No. (if known)

Please state whether the premises are Freehold or Leasehold

If leasehold, length remaining on the existing lease

Approximate age of the property

Purchase Price

VAT (if applicable)

Total Purchase Price

Will you "VAT opt" the property? Yes No

Is this to be treated as a transfer of a going concern? Yes No

Proposed date of exchange

Proposed date of completion

Does the property include a residential element? Yes No

Unusual provisions (if known) e.g. options, rights etc.

Lease Information

Existing Tennant (full name)	<input type="text"/>
Address	<input type="text"/>
	<input type="text" value="Postcode"/>
Telephone Number	<input type="text"/>
Rent per annum	<input type="text"/>
Term remaining	<input type="text"/>
Proposed New Tenant (full name)	<input type="text"/>
Address	<input type="text"/>
	<input type="text" value="Postcode"/>
Telephone Number	<input type="text"/>
Proposed Rent	<input type="text"/>
Frequency	<input type="text"/>
Term	<input type="text"/>
Tenant's Solicitor's Name	<input type="text"/>
Address	<input type="text"/>
	<input type="text" value="Postcode"/>
Telephone Number	<input type="text"/>
Facsimile Number	<input type="text"/>
E-Mail Address	<input type="text"/>

Vendor's Details

Vendor (full name)	<input type="text"/>
Address	<input type="text"/>
	<input type="text" value="Postcode"/>
Telephone Number	<input type="text"/>
Facsimile Number	<input type="text"/>
E-Mail Address	<input type="text"/>
Is the Vendor a Connected Party?	<input type="text"/>
Vendor's Agent (full name)	<input type="text"/>
Address	<input type="text"/>
	<input type="text" value="Postcode"/>
	<input type="text"/>
Telephone Number	<input type="text"/>
Facsimile Number	<input type="text"/>
E-Mail Address	<input type="text"/>
Vendor's Solicitor's Name	<input type="text"/>
Address	<input type="text"/>
	<input type="text" value="Postcode"/>
	<input type="text"/>
Telephone Number	<input type="text"/>
Facsimile Number	<input type="text"/>
E-Mail Address	<input type="text"/>

**If there is borrowing to assist the purchase, please supply a copy of the offer letter.
If no borrowing is required please tick this box**

Lending Source (full name)	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/> Postcode
Telephone Number	<input type="text"/>
Facsimile Number	<input type="text"/>
E-Mail Address	<input type="text"/>
Lender's Solicitor (full name) – if instructed	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/> Postcode
Telephone Number	<input type="text"/>
Facsimile Number	<input type="text"/>
E-Mail Address	<input type="text"/>
Amount of Loan	<input type="text"/>
Term	<input type="text"/>
Interest Rate (state fixed or variable)	<input type="text"/>
Periodic Repayment Amount	<input type="text"/>
Repayment Frequency	<input type="text"/>
Balance of funds to be provided from following:	
Source	<input type="text"/>
Amount	<input type="text"/> £
Source	<input type="text"/>
Amount	<input type="text"/> £
Source	<input type="text"/>
Amount	<input type="text"/> £

Survey / Valuation

A Property / Rental Valuation* is attached / to follow* addressed to the Scheme Trustees. This will include the open market value, open market rental value, reinstatement value, site plan and a general description of the property's state of repair.

The survey or valuation must also include a description of any relevant environmental matters, and provide confirmation that there are no issues which could adversely affect the property or create a liability for the Scheme Trustees.

* Delete if not applicable

Terms & Conditions

- 1 I understand and we acknowledge that:
 - 1.1 The provision of inaccurate or incomplete information may lead to a delay in the purchase and incur additional costs to our pension fund.
 - 1.2 Once purchased, any proposed works to the property must be approved by all the Trustees prior to commencement.
 - 1.3 As legal and beneficial owners the Trustees will always ensure that the building is adequately insured.
- 2 Premier Pension Services will be reimbursed for all expenses and cost it has already incurred should the property purchase not proceed.
- 3 Please instruct your solicitors/our own solicitors* to act on behalf of the pension scheme.
- 4 We confirm that the point of contact in relation to the purchase will be the solicitor unless otherwise instructed.
- 5 In the event of the vendor being a connected party, we understand that the transaction will need to be made on arm's length commercial terms.
- 6 We agree that the solicitor's fees and the fees of the Professional Trustee and Premier Pension Services may be withdrawn from my Trustees Bank Account.
- 7 In the event that the property and/or any subsequent development is subject to VAT, and the SSAS Trustees elect to register the Scheme for VAT, we understand that neither Premier Pension Services or any other company within the JLT Group can provide us with any specific advice relating to VAT matters, and we will take appropriate professional advice should we consider this necessary.

* Delete if not applicable

Note. There is no guarantee that any particular property investment will be acceptable. Premier Pension Services and the Trustee of the SSAS reserve the right to decline any property investment following the survey and valuation and legal processes we are obliged to undertake. Where the SSAS is being established for the purpose of purchasing a property, I understand that even if the property purchase cannot proceed, the SSAS will have been established and cannot be revoked. All costs in relation to the establishment of the SSAS will therefore still need to be met even if the property purchase does not proceed. This means that even if the property purchase cannot proceed, the Scheme will have been established and cannot be revoked. All costs in the process will have to be met even if the property is rejected for any reason.

Signed

Date

Thank you for completing this application.

Contact Details

**Premier Pension Services
Fitzalan House,
Fitzalan Road
CARDIFF, CF24 0EL
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Fax: 0845 880 0055
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www.premierpensionservices.co.uk**



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SERVICES

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