



INTELLIGENTMONEY

## PROPERTY QUESTIONNAIRE

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## Scheme Details

Scheme Name	<input type="text"/>
Client Name	<input type="text"/>
Address	<input type="text"/> <input type="text"/>
Contact Number	<input type="text"/>
Email	<input type="text"/>

## Property Details

Property Address	<input type="text"/> <input type="text"/>
Current Use of Property	<input type="text"/>
Intended Use of Property	<input type="text"/>
Leasehold/Freehold	<input type="text"/>

*N.B. HMRC does not permit a pension scheme to own a property with less than 50 years on the leasehold*

Purchase Price	<input type="text"/>
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Is the Purchase Price Subject to VAT  YES  NO

Is the property to be held jointly, if so what is the percentage split	<input type="text"/>
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## Survey/Report Details

Has a valuation been carried out on the property	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Has an environmental report been carried out on the property	<input type="checkbox"/> YES	<input type="checkbox"/> NO
Has an asbestos report been carried out on the property	<input type="checkbox"/> YES	<input type="checkbox"/> NO

## Vendor Details

Vendor Name	<input type="text"/>
Address	<input type="text"/> <input type="text"/>
Contact Number	<input type="text"/>
Email	<input type="text"/>

### Vendor's Solicitor Details

Contact Name	<input type="text"/>
Firm	<input type="text"/>
Address	<input type="text"/>
Contact Number	<input type="text"/>
Email	<input type="text"/>

### Tenant Details

Is there a Tenant Currently in place  YES  NO

Contact Name	<input type="text"/>
Firm	<input type="text"/>
Contact Number	<input type="text"/>
Email	<input type="text"/>

Are they to continue as tenants following the SIPP purchase  YES  NO

Are they connected to the member(s)  YES  NO

Is a new lease required  YES  NO

### Borrowing Details

Has a valuation been carried out on the property YES NO

Contact Name	<input type="text"/>
Firm	<input type="text"/>
Contact Number	<input type="text"/>
Email	<input type="text"/>
Amount of Loan	<input type="text"/>
Term	<input type="text"/>

## Purchaser Solicitor details

Intelligent Money requires a solicitor from our panel to act on behalf of the pension scheme(s) in property purchases. Whilst you do have the right to appoint your own solicitors, a solicitor from our panel will need to act on behalf of the scheme in checking-capacity to ensure that the purchase complies with pension scheme rules. This could result in double-billing for the scheme.

I/We am/are happy for a solicitor from the panel to act on behalf of the scheme(s)  YES  NO

I/We would like to appoint my/our own representation for the scheme(s)  YES  NO

Contact Name	<input type="text"/>
Firm	<input type="text"/>
Address	<input type="text"/>
Contact Number	<input type="text"/>
Email	<input type="text"/>
	<input type="text"/>

## Declaration

I/We understand that the sole legal owner of the property will be Intelligent Money who will hold the property on behalf of the pension scheme(s).

I/We understand that if either the property purchase or the letting of the property is to a connected party then it must be done at market value which will be determined by a valuation report.

I/We understand that a valuation report will need to be carried out by a RICS qualified surveyor irrespective of whether the transaction is on a connected or unconnected basis.

I/We understand that Intelligent Money are not VAT experts and that I/we am/are encouraged to seek advice from a VAT specialist before purchasing a property with VAT payable and subsequently registering the pension scheme(s) for VAT.

I/We understand that an environmental report needs to be obtained in order for the property purchase to continue. If there is not a scheme approved report - dated within 6 months of the date that proceedings commenced – available then I/we agree to a desktop environmental report being carried out by Intelligent Money on behalf of my/our scheme.

I/We understand that a member of Intelligent Money's panel of solicitors must act in either full or checking capacity in the property purchase. I/We accept and understand that if we choose to appoint our own representation then the pension scheme(s) will be billed for both the appointed solicitor and the panel solicitor who will act in checking capacity.

I/We understand that insurance is required to be in place prior to the property completion and that Intelligent Money will put a policy into effect on behalf of the pension scheme with the premium deductible from the SIPP.

Signed	Date
Signed	Date
Signed	Date
Signed	Date