

Wensley Mackay
Personal Pension

Property Questionnaire

Wensley Mackay

* * * * *

Use this form to tell us about the property you wish to move into your SIPP. Not all sections will apply to every property. If you have any questions relating to this form, please contact us either via email (info@wensley-mackay.com) or by phone on 01900 828882.

The form **must** be completed accurately. If you do not complete the form accurately, the SIPP might breach regulations and therefore become liable for large punitive tax charges.

A CLIENT CONTACT DETAILS

Title (<i>Mr/Mrs/Ms/Miss/Other</i>)	<input type="text"/>	Surname	<input type="text"/>
Forename(s)	<input type="text"/>		
Telephone	<input type="text"/>	Fax	<input type="text"/>
Mobile Phone	<input type="text"/>	Email	<input type="text"/>
Your Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text" value="Postcode"/>		

B PROPERTY DETAILS

Property Address	<input type="text"/>
	<input type="text"/>
	<input type="text" value="Postcode"/>
Please describe the property (i.e. Offices, Warehouse, Industrial Unit etc)	<input type="text"/>

Vendor's Name	<input type="text"/>		
Telephone	<input type="text"/>	Fax	<input type="text"/>
Contact Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text" value="Postcode"/>		

Selling Agent's Name	<input type="text"/>	
Telephone	<input type="text"/>	Fax <input type="text"/>
Contact Address	<input type="text"/>	
	<input type="text"/>	
	Postcode	
	<input type="text"/>	

Purchase price of property	£ <input type="text"/>	Including/excluding VAT
<i>Please note we will require a valuation from a chartered surveyor to confirm the value of the property.</i>		
Freehold or Leasehold	Freehold <input type="checkbox"/>	Leasehold <input type="checkbox"/>
<i>(Tick one box)</i>		
If Leasehold please provide:		
Outstanding term of lease	<input type="text"/>	Ground rent payable £ <input type="text"/>
Age of property (approx.)	<input type="text"/>	
Is the property subject to VAT?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
Proposed completion date	<input type="text"/>	
Is there any residential element within the property?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
<i>If you're not sure, please contact us before sending us this form.</i>		
If Yes, please provide full details. We also need to know who will occupy the residential part before you submit this form.	<input type="text"/>	
Is the Vendor connected to the Member?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If Yes, please provide details of the relationship/connection	<input type="text"/>	
Is any refurbishment or development intended which will be paid for by the Scheme?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If Yes please provide details, including costs and dates, of when the finance will be required.	<input type="text"/>	
<p>Note: It must be clearly agreed in advance, in writing, between the Scheme Trustees and the Tenant, who is to be responsible to pay for any refurbishments. Payment for refurbishments or improvements must be in accordance with the lease. Where the Scheme and Tenant are connected, failure to comply with this may result in an unauthorised payment by the Scheme and tax charges being levied against the Scheme.</p>		

C TENANT DETAILS

If the property is multi-tenanted please provide details for each tenant on a separate sheet.

Is the Tenant current, or proposed? Current (Tick one box) Proposed

Name/Contact for Tenant

Telephone Fax

Mobile Phone Email

Contact Address

 Postcode

Is the tenant/proposed tenant connected to the member(s)? Yes No

If yes, please provide details of the relationship/connection

Rent payable £ frequency of payments

Is rent paid up to date? Yes No

Outstanding term of lease (please also specify details of any break clauses)

Please note that in the event of the Tenant being connected to the Member rent must be at independently assessed market rent.

D SIPP TRUSTEES' SOLICITOR DETAILS

Please provide details of the solicitors who will be appointed to act on behalf of the Trustees to carry out the conveyance/transfer of the property and preparation of new leases. Please refer to the Property Notes for further details.

Solicitor's Practice name	<input type="text"/>		
Solicitor's Name	<input type="text"/>		
Telephone	<input type="text"/>	Fax	<input type="text"/>
Contact Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text" value="Postcode"/>		

E LENDER'S DETAILS (if applicable)

The Trustees may borrow funds from any commercial lender subject to their loan agreement.

Please provide the following details for your selected lender:-

Lender name	<input type="text"/>		
Contact's Name	<input type="text"/>		
Telephone	<input type="text"/>	Fax	<input type="text"/>
Contact Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text" value="Postcode"/>		

Signed	<input type="text"/>	Date	<input type="text"/>
--------	----------------------	------	----------------------

Updated April 2009