Wensley Mackay Small Self Administered Pension Scheme

Property Questionnaire

Wensley Mackay

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WENSLEY MACKAY LTD IS
AUTHORISED AND REGULATED BY THE FINANCIAL SERVICES AUTHORITY. SSAS IS NOT REGULATED BY THE FSA.

Wensley Mackay

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Use this form to tell us about the property you wish to move into your SSAS. 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, your SSAS might to breach regulations, and therefore become liable for large punitive tax charges.

A CLIENT CONTACT DETAILS

Title *(Mr/Mrs/Ms/Miss/Other)*		Surname	
Forename(s)			
Telephone		Fax	
Mobile Phone		Email	
Your Address			
	Postcode		

B PROPERTY DETAILS

Property Address	
	Postcode
Please describe the property (i.e. Offices, Warehouse, Industrial Unit etc)	

Vendor's Name			
Telephone		Fax	
Contact Address			
	Postcode		

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Selling Agent's Name			
Telephone		Fax	
Contact Address			
	Postcode		

Purchase price of property £ Including/excluding VAT

Please note we will require a valuation from a chartered surveyor to confirm the value of the property.

(*Tick one box*)

Freehold or Leasehold Freehold ☐ Leasehold ☐

If Leasehold please provide:

Outstanding term of lease Ground rent payable £

Age of property (approx.)

Is the property subject to VAT? Yes ☐ No ☐

Proposed completion date

Is there any residential element within the property? Yes ☐ No ☐

If you're not sure, please contact us before sending us this form.

If Yes, please provide full details. We also need to know who will occupy the residential part before you submit this form.

Is the vendor connected with the Scheme? Yes ☐ No ☐

If Yes, please provide details of the relationship/connection

Is any refurbishment or development intended which will be paid for by the Scheme? Yes ☐ No ☐

If Yes please provide details, including costs and dates, when the finance will be required.

Note: Who is to be responsible to pay for any refurbishments must be clearly agreed in advance, in writing, between the Scheme Trustees and the Tenant. 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.

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C TENANT DETAILS

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

(*Tick one box*)

Is the tenant current, or proposed? Current ☐ 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(s) rent must be at independently assessed market rent).

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D SSAS 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			
Solicitor's Name			
Telephone		Fax	
Contact Address			
	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			
Contact's Name			
Telephone		Fax	
Contact Address			
	Postcode		

Signed		**Date**	

Updated April 2009

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