



Property Data Form

PART A - CONTACT INFORMATION

Scheme Name: _____

Contact Name: _____

Contact Email: _____

PART B - PROPERTY INFORMATION

1st Line of Property Address: _____

Post Code: _____

How will be property be used: _____

Premises: ~~Leasehold~~ Freehold

Annual Ground Rent (if applicable): _____

Proposed Date of Completion or
Exchange of Contracts: _____

Is there an Asbestos Record/ Report
available? Yes No

Does the Property
include residential accommodation? Yes No

Will any Refurbishment Costs
be met by the SSAS? Yes No

PART C - PROPERTY PURCHASE/TRANSFER

Is Purchase subject to VAT? Yes No

If this is a property transfer and not a sale, is
there mortgage? Yes No

Outstanding Amount of Loan (if yes): _____



Lender Details:

Name: _____

Mortgage Account Number: _____

Mortgage Due Date: _____

PART D - FUNDING INFORMATION

Purchase Price (excluding VAT): _____

Development Costs (excluding VAT): _____

VAT (if applicable): _____

TOTAL: _____

Are the Trustees to 'VAT opt' the property?	Yes	No
------------------------------------------------	-----	----

Is this to be treated as a Transfer of a Going Concern?	Yes	No
------------------------------------------------------------	-----	----

PART E - TRUSTEE BORROWING

Lending Source: _____

Contact Name: _____

Email Address: _____

Address: _____

Amount of Loan:

PART F - LEASE INFORMATION

Existing Lease:

Tenant: _____

Rent Amount (for full year): _____

Start Date of Lease: _____

Is this Lease to continue after the purchase?	Yes	No
-----------------------------------------------	-----	----



New Lease (if applicable):

Proposed Tenant:

Rental Amount (for full year):

PART G - SOLICITOR INFORMATION (If you have already appointed a solicitor, please complete this form)

Your Solicitor's Details:

Solicitor's Name:

Contact Name:

Telephone Number:

Email Address:

Please attach the following items for a **new property** purchase:

Terms of Sale Agreement (this will be supplied by your agent)
Copy of the Lease (where a lease is being transferred)
Property valuation
EPC Report

Please attach the following items for a **property transfer** from another pension fund:

Copy of the current buildings insurance
Copy of the lease
Most recent property valuation report
EPC Report