



Scheme Name: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact Email: \_\_\_\_\_

1st Line of Property Address: \_\_\_\_\_

Post Code: \_\_\_\_\_

How will the 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
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Does the Property include residential accommodation?	Yes	No

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

Is Purchase subject to VAT?	Yes	No
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If this is a property transfer and not a sale, is there mortgage? Yes ☐ No ☐

Outstanding Amount of Loan (if yes): \_\_\_\_\_

Name(s) of Seller

Is the Seller connected to anyone in the SSAS or the Principal Employer.	Yes	No
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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
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Is this to be treated as a Transfer of a Going Concern?	Yes	No
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#### **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
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New Lease (if applicable):

Proposed Tenant:

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Rental Amount (for full year):

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

Your Solicitor's Details:

Solicitor's Name:

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Contact Name:

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Telephone Number:

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Email Address:

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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