

SSAS Property Questionnaire

Please complete the questionnaire as fully as possible and return with signed Property administration and risk warning notice

1. Scheme Contact Details

Scheme Name:

Main Contact

Address:

Phone Number:

Email:

2. Property details

Address:

Postcode:

Current use of property:

Intended use of property:

Previous use of property:

Approximate age of property Number of Storeys Basement Yes No

Listed Building? Yes No If Yes what category :

Registered with land registry? Yes No

The property is: Freehold Leasehold

Does the property include residential element? Yes No, **If yes, it may not be possible to include in purchase**

Purchase price? £

Is purchase price subject to VAT? Yes No

If yes is the above figure inclusive? Yes No

We do not offer any VAT advice or services and you should seek professional VAT advice should you require it.

3. Survey information

Has a property valuation report been produced? Yes No

Has an environmental risk report been produced/included in the valuation? Yes No

Has an asbestos survey been produced /included in the valuation? Yes No

Have there been any known claims or incidents of an environmental nature? Yes No

If yes, please state the circumstances and outcome

4. Vendor details

Name:

Address:

Postcode:

Phone number:

E-mail:

Is the vendor connected to the member? Yes No. if Yes, a valuation from an independent RICS certified surveyor will be require to set the purchase price

5. Vendor's Solicitor details

Name:

Address:

Postcode:

Phone number:

E-mail:

6. Selling agent details

Name:

Address:

Postcode:

Phone number:

E-mail:

7. Representation

The purchaser will require its own legal representative. Please choose an option.

I am/ we are happy for solicitors to be appointed by Talbot & Muir / TM Trustees Limited.

I am/we are appointing our own solicitors.

Firm name:

Solicitor:

Address:

Postcode:

Phone number:

E-mail:

8. Lease information

Existing lease, where applicable

Tenant:

Rent:

Term:

Rent review:

If new lease is required on completion

Tenant:

Rent:

Term:

Are you appointing a property manager?

Yes

No, if Yes please provide details below

Firm name:

Contact:

Address:

Postcode:

Phone number:

E-mail:

Is the tenant connected to the member?

Yes

No, if Yes, a valuation from an independent RICS certified surveyor will be require to set the rental figure.

9. Borrowing information

Are the Trustees borrowing to assist with the purchase?

Yes

No, if Yes please provide details below and a copy of the offer letter

Lending source:

Point of contact:

Address:

Postcode:

Phone number:

E-mail:

Amount of loan: £

Term:

Interest rate:

Repayment terms:

Is security over the property to be granted?

Yes

No

10. Insurance

Talbot and Muir require that property insurance be in place at all times from exchange of contracts.

Jelf Insurance Brokers have arranged a policy via a panel of insurers, specifically for Talbot and Muir clients. The policy cover has been specifically designed to meet the needs of property owners. Please ask if you require further information.

Talbot and Muir require your consent before providing your contact details and a copy of your completed insurance questionnaire to Jelf Insurance Brokers of Edgecumbe Hall, Richmond Hill, Clifton, Bristol BS8 1AT. If you agree, Jelf will process this information and will make direct contact with you to provide you with details of the policy and a personal quotation.

Once we have passed your data to Jelf Insurance Brokers, they will be responsible for ensuring it is handled in accordance with their own obligations under data protection law and if you have any queries or requests regarding their handling of your personal data you should contact them directly at the address shown above or using such other contact details as they may give to you from time to time. If you change your mind about using Jelf Insurance Brokers you can communicate this to us and we will let Jelf Insurance Brokers know that you no longer consent to them having your data. You can notify us of this decision by contacting Talbot and Muir in writing at 22-26 Clarendon Street, Nottingham NG1 5HQ or by email to enquiries@talbotmuir.co.uk

I consent to Talbot and Muir passing on details to Jelf Insurance Brokers and agree they may contact me.

I do not wish to be contacted by Jelf Insurance Brokers. Please do not pass on my details as I will make my own insurance arrangements.

Signed:	<input type="text"/>	
Trustee/Member name:	<input type="text"/>	Date: <input type="text"/>
Signed:	<input type="text"/>	
Trustee/Member name:	<input type="text"/>	Date: <input type="text"/>
Signed:	<input type="text"/>	
Trustee/Member name:	<input type="text"/>	Date: <input type="text"/>
Signed:	<input type="text"/>	
Trustee/Member name:	<input type="text"/>	Date: <input type="text"/>