

Property Questionnaire

Please complete the questionnaire as fully as possible and return with a signed Property administration overview and risk warning notice per member.

Member details

Member name/SIPP No(if known):

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Property details

Address:

Postcode:

Current use of property:
(detailed description)

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

* If the purchase price is **not** subject to VAT, but there is a requirement for your SIPP to be registered for VAT following completion of the purchase, e.g. where major renovation works are to be undertaken, you must notify us of this at the appropriate time. Please refer to part 15 of our SIPP Property administration overview and risk warning notice that you are required to sign and return to us along with this Property Questionnaire. This section contains important information concerning VAT registration and subsequent quarterly VAT returns.

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

Environmental Screening information

Site larger than 2 Hectares (4.94 Acres)? Yes No

Is there any building, construction or re-development planned for the site? Yes No

If yes, please provide a brief description

At the time of signing this application, are you aware of any facts or circumstances which may reasonably be expected to result in a claim or claims being asserted against you or your company as a result of the release of pollutants from this site into the environment:

Yes No

If yes, please provide a brief description

Please return a cheque made payable to "Talbot and Muir" for the relevant amount as detailed below.

	Inc. VAT
Up to 2 hectares – up to 20,000sqm	£213.00
2 up to 5 hectares - 20,001sqm to 50,000sqm	£276.00
5 up to 10 hectares - 50,001sqm to 100,000 sqm	£342.00
10 up to 15 hectares – 100,001 sqm to 150,000 sqm	£420.00
15 up to 25 hectares – 150,001 sqm to 250,000 sqm	£690.00
25 up to 35 hectares – 250,001 sqm to 350,000 sqm	£762.00
35 up to 40 hectares – 350,001 sqm to 400,000 sqm	£840.00
40 up to 150 hectares - 400,001 sqm to 1,500,000 sqm	£960.00

Vendor details

Name:

Address:

Postcode:

Phone number:

E-mail:

Is the vendor connected to the member? Yes No

Vendor's Solicitor details

Name:

Address:

Postcode:

Phone number:

E-mail:

Selling agent details

Name:

Address:

Postcode:

Phone number:

E-mail:

Representation

TM Trustees Limited will require their own legal representation. Whilst we are happy for you to have your own representation there will be an element of 'double billing' involved as both parties' solicitors will need to check all documentation. (please choose one option below)

I am/we are happy for the solicitors representing TM Trustees Limited to represent me/us also

I am/we are appointing our own solicitors to represent my/our pension fund and understand there will be an additional cost to this.

Firm name:

Solicitor:

Address:

Postcode:

Phone number:

E-mail:

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:

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

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 contact us if you require further information.

Talbot and Muir require your consent before providing your contact details and a copy of this form 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.

My contact details are :

	Phone Number	<input style="width: 95%;" type="text"/>
	Email address	<input style="width: 95%;" type="text"/>

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.

Member name:	<input style="width: 95%;" type="text"/>	Date:	<input style="width: 95%;" type="text"/>
Signed:	<input style="width: 95%;" type="text"/>		
Member name:	<input style="width: 95%;" type="text"/>	Date:	<input style="width: 95%;" type="text"/>
Signed:	<input style="width: 95%;" type="text"/>		
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Signed:	<input style="width: 95%;" type="text"/>		

talbotandmuir
 22-26 Clarendon Street
 Nottingham
 NG1 5HQ
 Telephone 0115 841 5000
 Facsimile 0115 841 5027
 www.talbotmuir.co.uk

Talbot and Muir Limited provides administration to Self Invested Personal Pensions and Small Self Administered Pension Schemes, and is authorised and regulated by the Financial Conduct Authority.

Talbot and Muir is the trading name for Talbot and Muir Limited (company number 02869547), registered in England, registered address 22 Clarendon Street, Nottingham, NG1 5HQ. A list of directors is available upon request.

ERA/FRA/TM SIPP-Prop Q04- November 18