

SIPP Property Questionnaire

Please complete the questionnaire as fully as possible and return with a signed Property Administration Overview and Risk Warning Notice document 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 with this Property Questionnaire, as this section contains important information concerning VAT registration and subsequent quarterly VAT returns.

Survey information

Has a property valuation or structural survey report been produced? * Yes No

* Unless this is a connected party transaction, we will not require to see a survey or valuation report of the property and we will never instruct a surveyor. For your own protection we recommend you arrange for a survey to be undertaken which should be by a RICS member (or equivalent body).

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

Please note that by returning this form you are instructing us to proceed with producing an environmental screening report on the proposed property. If the purchase subsequently does not complete you will still be liable for this charge.

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 made 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 20,000 sqm	£213.00
2 up to 5 hectares – 20,001 sqm up to 50,000 sqm	£219.00
5 up to 10 hectares - 50,001 sqm to 100,000 sqm	£231.00
10 up to 15 hectares – 100,001 sqm to 150,000 sqm	£249.00
15 up to 20 hectares – 150,001 sqm to 200,000 sqm	£303.00
20 up to 25 hectares – 200,001 sqm to 250,000 sqm	£363.00

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

Vendor's solicitor details

Name:

Address:

Postcode:

Phone number:

E-mail:

Selling agent details

Name:

Address:

Postcode:

Phone number:

E-mail:

Representation

Our appropriate trustee company will require its 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 the trustee company 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:

Tenant Activities:

Rent: Term:

Rent review:

If new lease is required on completion

Tenant:

Tenant Activities:

Rent: Term:

If multiple leases or sub-leases please provide details on additional pages

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 required to set the rental figure.

Borrowing information

Are the Trustees borrowing to assist with the purchase? Yes No, if Yes please provide details below and a copy of the mortgage 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

We require that property insurance be in place at all times from exchange of contracts.

Erskine Murray Insurance Brokers have arranged a block insurance policy, 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 Erskine Murray Insurance Brokers of 1 Penman Way, Grove Park, Leicester, LE19 1SY. If you agree, Erskine Murray will process the information contained on this form 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 Erskine Murray Insurance Brokers, they will be responsible for ensuring it is handled in accordance with their own obligations under data protection law. 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 Erskine Murray Insurance Brokers you can communicate this to us and we will let Erskine Murray 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 55 Maid Marian Way, Nottingham, NG1 6GE or by email to enquiries@talbotmuir.co.uk.

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

My contact details are:

Phone Number

Email address

Address

Insurance Information

Buildings Reinstatement Value*:

*This should be the reinstatement cost of the property with considerations including demolition/debris removal, materials, labour, fees and taxes. If you are unsure what value to include we would recommend that you utilise the services of a RICS qualified Buildings Surveyor. Erskine Murray can order remote RICS guided valuations from Rebuild Cost Assessment for a cost of £135 including VAT for each property.

Building Construction:
(Walls, roof and flooring materials)

Heating Method:
(Appliance and fuel)

Would you like to include any of the following Optional Extras in the proposition:

Legal Expenses. This provides access to legal advice and could cover legal costs in the event of a legal dispute in connection to the insured property.

 Yes

 No

Loss Recovery. This provides access to a loss assessor to work for you in the event of a material damage claim likely to exceed £5,000 in settlement.

 Yes

 No

Rebuild Cost Assessment – Reinstatement Valuation Report. For a fee of £135 including VAT Erskine Murray can order a RICS guided reinstatement valuation for your property to help accurately guide the sum insured and protect against underinsurance

 Yes

 No

The insurance terms will be subject to the following assumptions, if any of these are not true please provide further details in order that they can be discussed further with the underwriters:

- There have been no claims or losses within the last 3 years, whether insured or not, either made by you or against you
- The property is in a good state of repair, not undergoing renovation, repair or alteration, or anticipated to be undergoing renovation, repair or alteration during the next 12 months
- The property has not suffered from nor shows any visible signs of damage from subsidence, landslip or ground heave
- Any flat felt roofing does not exceed 25% of the total roof area and any flat felt roofing is under 7 years old
- There is no known history of flooding at the address
- You have never had any Risk Improvement requirements imposed by the current or previous insurers which have not yet been completed to their satisfaction

If any of the above statements are not true, please provide details in the box below:

You have a duty to make a fair representation of the risk which you wish to insure. This means that you must disclose all relevant information before the insurance contract commences.

This information includes those material circumstances that would influence a prudent insurer on whether to insure the risk (and if so on what terms)

Declarations

The terms are based on the following assumptions, if any of these are not true please provide further details in order that they can be discussed with the underwriters. Please tick all to confirm that you have read and understand the declarations:

- You have never had insurance cancelled, renewal refused or subject to special terms
- You have never been convicted or charged with a criminal offence, or within the last 3 years received an official caution for a criminal offence, other than a motoring offence
- You have never knowingly failed to conform to legislation pertaining to Health and Safety at work activities
- You have never been declared bankrupt or are now subject of any current bankruptcy proceedings or any voluntary or mandatory Insolvency or winding up procedures

If any of the above statements are not true, please provide details in the box below:

Member name:		Date:	
Signed:			
Member name:		Date:	
Signed:			
Member name:		Date:	
Signed:			
Member name:		Date:	
Signed:			

talbotandmuir

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www.talbotmuir.co.uk

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

Talbot and Muir is the trading name for Talbot and Muir Limited (company number 02869547), registered in England, registered address 55 Maid Marian Way, Nottingham, NG1 6GE. A list of directors is available upon request.

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