

# SSAS Property Questionnaire

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Please complete the questionnaire as fully as possible and return with signed Property Administration and Risk Warning Notice document.

## 1. Scheme Contact Details

Scheme Name:

Main Contact:

Address:

Phone Number:

Email:

## 2. 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 there an option to tax on the property?  Yes  No

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

\* 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:

### 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

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:

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.

**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**

**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 either at our Nottingham office at 55 Maid Marian Way, Nottingham, NG1 6GE and by email to [enquiries@talbotmuir.co.uk](mailto:enquiries@talbotmuir.co.uk) or our Leeds office at 33 Park Square West, Leeds, LS1 2PF and by email to [enquiriesleeds@talbotmuir.co.uk](mailto:enquiriesleeds@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.** Will appoint 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 5 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 is under 7 years old or has been professionally inspected in the past 3 years
- 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:

Signed:			
Trustee/Member name:		Date:	
Signed:			
Trustee/Member name:		Date:	
Signed:			
Trustee/Member name:		Date:	
Signed:			
Trustee/Member name:		Date:	

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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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