

# SIPP Property Questionnaire

Please complete the questionnaire as thoroughly as possible and return with a Property Administration and Risk Warning Notice document signed by each member.

## 1. Member Details

Member name :	<input type="text"/>	SIPP No (if known):	<input type="text"/>
Member name :	<input type="text"/>	SIPP No (if known):	<input type="text"/>
Member name :	<input type="text"/>	SIPP No (if known):	<input type="text"/>
Member name :	<input type="text"/>	SIPP No (if known):	<input type="text"/>
Member name :	<input type="text"/>	SIPP No (if known):	<input type="text"/>

## 2. Property Details

Address:

Post code:

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

If yes, Land Registry Title Number:

The property is:  Freehold  Leasehold

If Leasehold, is there building insurance in place for commonparts?  Yes  No

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

\* 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 16 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. 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 strongly recommend you arrange for a survey to be undertaken which should be by a member of the Royal Institution of Chartered Surveyors (RICS) 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 produced?  Yes  No

If yes, please state the circumstances and outcome:

### 4. 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

Site Size (hectares)	Site Size (square meters)	Price (excl vat)	Price (incl vat)
0 - 2	0 – 20,000	£210.00	£252.00
2 - 5	20,001 – 50,000	£216.50	£259.80
5 - 10	50,001 – 100,000	£228.00	£273.60
10 – 15	100,001 – 150,000	£246.00	£295.20
15 – 20	150,001 – 200,000	£299.00	£358.80
20 - 25	200,001 – 250,000	£357.50	£429.00

### 5. Vendor Details

Contact name:

Address:

Post code:

Phone Number:

Email address:

Is the vendor connected to the member?  Yes  No

If yes, a valuation from an independent RICS certified surveyor will be required to set the purchase price.

### 6. Vendor’s Solicitors Details

Firm name:

Contact name:

Address:

Post code:

Phone Number:

Email address:

### 7. Selling Agent Details

Firm name:

Contact name:

Address:

Post code:

Phone Number:

Email address:

## 8. Legal 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. **This means fees will be payable to your own solicitor and the solicitor representing the trustee company.**

Please choose one option below.

- I/We agree to 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:

Post code:

Phone Number:

Email address:

## 9. Lease information

**Existing lease**, where applicable

Tenant:

Tenant Activities:

Is the tenant connected to the member?  Yes  No

Rent: £  Term:

Is rent subject to VAT?

Lease start date:

Lease expiry date:

Rent Review:

Are rental payments up to date?  Yes  No

If **no**, please provide reasons why, along with details of any arrangements being made to bring the rent arrears up to date.

**If new lease is required on completion**

Tenant:

Tenant Activities:

Rent:

Term:

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**

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

### 10. Property Manager

Are you appointing a property manager?  Yes  No

Will they be responsible for issuing rental invoices?  Yes  No

**If Yes please provide details**

Firm Name:

Contact Name:

Address:

Postcode:

Phone Number:

Email address:

### 11. Borrowing information

Are the trustees borrowing to assist with the purchase?  Yes  No

Lending source:

Point of contact:

Address:

Postcode:

Phone Number:

Email address:

Amount of loan: £

Interest Rate:

Term:

Repayment terms:

Is security over the property to be granted?  Yes  No

If yes, please provide details of the security:

## 12. Insurance

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

Marsh Ltd\* have arranged a block insurance policy for Talbot and Muir clients, specifically designed to meet the needs of commercial property owners.

Talbot Muir require your consent before providing your contact details and a copy of this form to Marsh, who will process the information contained in this form, produce a personal quotation and liaise with us regarding the insurance cover.

Once we have passed your data to Marsh, 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 below. Their Privacy Notice can be found on their website [www.marsh.com](http://www.marsh.com)

If you change your mind about using Marsh, you can communicate this to us and we will inform them that you no longer consent to them holding your personal data. You can notify us of this decision by contacting us in writing at 55 Maid Marian Way, Nottingham, NG1 6GE or by email to [enquiries@talbotmuir.co.uk](mailto:enquiries@talbotmuir.co.uk)

\*Marsh Ltd, 1, Tower Place West, Tower Place, London, EC3R 5BU. Please contact us if you require further information.

I consent to Talbot and Muir passing on details to Marsh Ltd

**My contact details are:**

Contact name:

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, fee and taxes. If you are unsure what value to include we would recommend that you utilise the services of a RICS qualified Building Surveyor to obtain this for you.

Building Construction:  
(Walls, roof and flooring materials)

Heating Method:  
(Appliance and fuel)

**The insurance terms will be subject to the following assumptions:**

- 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 in order that this can be discussed with the underwriters:

You have a duty to make a fair representation of the risk that 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

To be completed by the member(s)/trustee(s). (please tick each box  and sign below)

- 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 in order that this can be discussed with the underwriters:

## Our Services

If you experience difficulties accessing any of our services due to personal circumstances, we may be able to make some adjustments to help you. Please provide us with details of your needs so we can assess any reasonable adjustments that we can make for you.

The information you provide will help us assess your requirements and make any reasonable adjustments to improve how we work and communicate with you.

We will require your express consent to process this information, and to enable us to share this data with other third parties where appropriate, e.g. investment firms or advisers, to help us, and others to continue to meet your needs. Please could you kindly provide this by ticking the box below.

I agree to the above information being processed by Talbot and Muir Ltd, to include being shared and gathered between relevant third parties.

Please refer to our Privacy Notice, should you require further guidance on how we will collect use and protect your personal information. This can be found on our website [www.talbotmuir.co.uk](http://www.talbotmuir.co.uk) or please ask your adviser or us for a copy.

Your consent to share personal information is entirely voluntary and you may withdraw your consent at any time. Should you have any questions about this process, or wish to withdraw your consent please contact our Admin Department on 0115 841 5000 or via email at [customer.support@talbotmuir.co.uk](mailto:customer.support@talbotmuir.co.uk)

Signed:  Date

**Trustee/Members name:**

Signed:  Date

**Trustee/Members name:**

Signed:  Date

**Trustee/Members name:**

Signed:  Date

**Trustee/Members name:**

55 Maid Marian Way, Nottingham, NG1 6GE | t. 0115 841 5000 | f. 0115 841 5027 | e. [enquiries@talbotmuir.co.uk](mailto:enquiries@talbotmuir.co.uk) | w. [www.talbotmuir.co.uk](http://www.talbotmuir.co.uk)

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