



## ASTUTE SIPP PROPERTY QUESTIONNAIRE

Please complete the following questions, or ask the solicitor dealing with the property purchase/sale to complete them, and return the questionnaire to us.

Name: \_\_\_\_\_

SIPP Reference Number: \_\_\_\_\_

1. Address of Property: \_\_\_\_\_

\_\_\_\_\_

Please state whether Freehold or Leasehold: \_\_\_\_\_

If Leasehold, please state:

• Unexpired term of lease: \_\_\_\_\_

• Leasehold ground rent: \_\_\_\_\_

• Landlord (if known): \_\_\_\_\_

2. Name of vendor: \_\_\_\_\_

Is the vendor connected? YES/NO

If YES, state the connection: \_\_\_\_\_

3. Anticipated date of completion: \_\_\_\_\_

4. Purchase Price: £ \_\_\_\_\_  
(excluding expenses)

5. Is VAT included in the Purchase Price? YES/NO

Person dealing with VAT: \_\_\_\_\_

6. Will the Scheme require a loan to assist with the purchase? YES/NO  
(must not exceed 50% of net value of SIPP)

Amount of loan: £ \_\_\_\_\_

Terms of loan: \_\_\_\_\_

Name of Lender and Contact Name: \_\_\_\_\_

Telephone number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

7. Name of tenant/prospective tenant: \_\_\_\_\_

Is the tenant connected?

YES/NO

If YES, state the connection: \_\_\_\_\_

8. The use to which the property will be put (e.g. office, retail shop, etc:)

\_\_\_\_\_

9. Does the property include a residential element?

YES/NO

10. The amount of the initial rental: £ \_\_\_\_\_

11. The term of the lease: \_\_\_\_\_

12. The date of the next rent review: \_\_\_\_\_

#### SURVEYOR DETAILS

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Contact Name: \_\_\_\_\_

Tel: \_\_\_\_\_

Fax: \_\_\_\_\_

#### SOLICITOR DETAILS

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Contact Name: \_\_\_\_\_

Tel: \_\_\_\_\_

Fax: \_\_\_\_\_

When returning this questionnaire, please enclose:

- ◇ A copy of the independent valuation of the rental value
- ◇ A copy of the lease or tenancy agreement, if available
- ◇ Details of Property Sale.
- ◇ A copy of the environment report
- ◇ A copy of the Asbestos Report

13. Name of purchaser: \_\_\_\_\_

Is the purchaser connected to the Company or related to the Pension Scheme members?

YES/NO

If YES, state the connection: \_\_\_\_\_

14. Date of Sale: \_\_\_\_\_

15. Sale Price: £ \_\_\_\_\_

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