



Guardian Pension Consultants

Providing Pension Trustee & Administration
Services for Self-Administered Pensions

GPC

PROPERTY QUESTIONNAIRE

Important Notes:

This form should ONLY be completed when you have read, and agree to comply with and be bound by, the terms, information and content of the Guardian Property Guide.

Please complete this form in full, using block capitals. Incomplete forms may cause delays in purchasing the property. Guardian Pension Consultants cannot be held responsible in such cases.

Please initial any changes you make and do not use correction fluid if you make a mistake.

Let's create a SIPP solution!





Section 1. Personal Details

Member 1

Title Mr Mrs Miss Ms Dr

Surname Forename(s)

Address
 PostCode

Email address Telephone No. Home

Telephone No. Business Fax Number

Date of Birth / / National Insurance Number

Member Number

Member 2 (If joint purchase)

Title Mr Mrs Miss Ms Dr

Surname Forename(s)

Address
 PostCode

Email address Telephone No. Home

Telephone No. Business Fax Number

Date of Birth / / National Insurance Number

Member Number



Member 3 (If joint purchase)

Title Mr Mrs Miss Ms Dr

Surname Forename(s)

Address
 PostCode

Email address Telephone No. Home

Telephone No. Business Fax Number

Date of Birth / / National Insurance Number

Member Number

Member 4 (If joint purchase)

Title Mr Mrs Miss Ms Dr

Surname Forename(s)

Address
 Post Code

Email address Telephone No. Home

Telephone No. Business Fax Number

Date of Birth / / National Insurance Number

Member Number



Section 2. Details of Property Being Purchased

Address

Property Description:

Development Land Shop Warehouse Office Other

If Other, please state

What is the current use of the property?

What is the intended use of the property?

Is the property: Freehold Leasehold If leasehold, when does the lease end?

Annual Ground Rent (if any)

£

Has the property been registered at the Land Registry? Yes No

Are there any unusual provisions relating to the property (options, rights etc)? Yes No

If yes please provide details

Approximate age of property

Does the property include any living/residential accommodation? Yes No

Are there any construction, refurbishment or re-development plans for the property? Yes No

If yes, please provide details

Is there any connection between the developer and you, or any company contributing to the SIPP? Yes No

If yes please provide details

Are the buyer and the seller connected parties? Yes No

If yes, please provide details

Are you aware of any disputes, of any kind, in relation to this property? Yes No

If yes, please provide details



Section 3. Environmental Issues

What Energy Performance Certificate will the vendor supply?

Energy Performance Certificate Display Energy Certificate None

If none, please provide details

To the best of your knowledge has the site ever been subject to a full environmental survey? Yes No

Are there any known claims or incidents of an environmental nature in respect of the property or any surrounding property? Yes No

If yes, please provide details

Will the intended use, or has any previous use, involved any process or material that could reasonably be construed as a potential pollutant?

If yes, please provide details

Is the property located in a residential area? Yes No

If yes, is there any plant being used at the property? Yes No

Is the site located within 100 metres of a waterway? Yes No

Has the property been inspected pursuant to the Asbestos Regulations and the Inspection Report prepared? If yes, please provide a copy of the report. Yes No

Are there any underground storage tanks on the site? Yes No

Are there any above ground storage tanks on the site? Yes No

Are there any other chemicals or fuels stored on site (other than those used in a normal office building)? Yes No

* If you have answered yes to any of the above, please provide details in the space below:



Section 4. Property Purchase Price

Property Purchase Price (excluding VAT)

VAT (if applicable)

Stamp Duty

Legal & Professional Costs

Refurbishments/Improvements

Other

Total Purchase Price

£	_____
£	_____
£	_____
£	_____
£	_____
£	_____
£	_____
£	_____

Is the SIPP to register for VAT? Yes No

Is the property to be treated as a 'Transfer of a Going Concern' (TOGC)? Yes No

Is the SIPP to own 100% of the property? Yes No

If no, please provide split below:

	Name	% Ownership
Member 1		
Member 2		
Member 3		
Member 4		
Other Party		
Other Party		
Other Party		

Proposed Date of Exchange

Proposed Date of Completion



Section 5. Financing the Property

Existing SIPP funds

Contributions

Transfers from other pension plans

Borrowing

Other

Total Purchase Price

£	_____
£	_____
£	_____
£	_____
£	_____
£	_____

Section 6. Borrowing Information

Is a loan required to purchase the land/property?

Yes No

If yes, please complete the following:

Loan Amount Loan Term Interest Rate

Repayment Frequency Monthly Quarterly Other

I wish to use Guardian Pension Consultants Ltd preferred Lender

Yes No

If no I wish to use:

Lender Name

Lender Address
Postcode

Contact Name Contact Telephone Number

Email Address

Lenders Solicitor

Solicitor Address
Postcode

Contact Name Contact Telephone Number

Email Address



Section 7. Lease Information

Existing Lease

New Lease

Tenant/Proposed Tenant Name

Tenant Address
 Postcode

Telephone Number

Current/Proposed Annual Rent Due

Repayment Frequency: Monthly/Quarterly/Other

Start Date of Lease

End Date of Lease

Are the member and the tenant connected parties? Yes

No

If yes, please provide details

Tenants Solicitor

Address
 Postcode

Contact Name

Contact Telephone Number

Email Address



Section 8. Property Insurance

Guardian Pension Consultants Ltd will arrange property insurance cover under a block buildings insurance policy as outlined in the Property Guide.

If you do NOT require this cover please put a 'X' in the box and provide full details of the Insurance cover arranged and provide a copy of the policy document.

Section 9. Other Professional Parties

Independent Financial Adviser

IFA Name

IFA Company

IFA Address

Postcode

Telephone Number

Email Address

Solicitor

I wish to use Guardian Pension Consultant's Ltd recommended Solicitor
If no, please complete the following:

Yes

No

Solicitor Name

Solicitor Company

Address

Postcode

Telephone Number

Email Address



Surveyor

Surveyor Name Surveyor Company

Address
 Postcode

Telephone Number

Email Address

Vendor

Vendor Name

Address
 Postcode

Telephone Number

Email Address

Vendor's Solicitor

Name Company

Address
 Postcode

Telephone Number

Email Address

Sales Agent

Name Company

Address
 Postcode

Telephone Number

Email Address



Section 10. Declaration

I wish to use my Self Invested Personal Pension plan to purchase the property outlined in Section 2 of this property questionnaire.

I have read and understood the Guardian Pension Consultants Ltd Property Guide and I agree to comply with and be bound by the terms, information and content contained therein.

I authorise Guardian Pension Consultants Ltd to provide and request information necessary to complete the property purchase and to comply with relevant legislation.

I instruct Guardian Pension Trustees Ltd to arrange property insurance cover under the terms of the 'block' buildings insurance details in this questionnaire and I agree to and authorise payment of premiums from my SIPP (unless I have indicated in Section 8 that alternative cover is to be arranged).

I agree that all costs associated with the purchase and administration of the property should be met by my pension fund and I authorise payment of those costs from my pension fund.

If the property purchase is funded by more than one member, we nominate as the point of contact.

If the vendor is a 'connected party' I understand that the transaction must take place on an 'arm's length' commercial basis.

I understand that Guardian Pension Consultants Ltd and Guardian Pension Trustees Ltd does not and cannot provide advice relating to Value Added Tax (VAT). I will, if necessary, take appropriate professional advice regarding Value Added Tax.

I agree to indemnify Guardian Pension Trustees Ltd and Guardian Pension Consultants Ltd in respect of all liabilities, losses, damages and costs that may occur in acquiring and holding the property in my pension fund.

Signed (Member 1) Date

PRINT NAME

Signed (Member 2) Date

PRINT NAME

Signed (Member 3) Date

PRINT NAME

Signed (Member 4) Date

PRINT NAME