

1 Introduction

This questionnaire should be completed for each property that is to be purchased/transferred.
All members of the scheme should complete Appendix I on page 7.
Please note that making a false declaration on this application can have serious consequences.

2 Scheme Information

Scheme Name

Does the property form part of an in-specie transfer? Yes No

Does the property form part of an in-specie contribution? Yes No

3 Property Information

Property Address

 Postcode

Type of Property

Is the property being purchased from a connected party? Yes No

Does the property contain residential accommodation? Yes No

Has the property been registered at Land Registry? Yes No

Is the property Freehold or Leasehold? Freehold Leasehold

If Leasehold, please state the remaining term years

Annual ground rent (if applicable) £

Is the property to be jointly owned? Yes No

If yes please provide details of the joint owners:

Is there any refurbishment or development work to be carried out?
If yes please provide details at section 9 Yes No

Is the property adjacent to property owned by a connected party? Yes No

4 Purchase Information

Purchase Price

VAT

Development Costs

VAT

Is the property currently VAT elected?

Yes

No

Are the Trustees to Opt to Tax the scheme?

Yes

No

Is the purchase to be treated as a transfer of a going concern?

Yes

No

Please note the scheme must be VAT elected for a transfer of a going concern to take place.

5 Funding Information

Source of Funds

1

2

3

Amount

6 Borrowing Information

Lender Name

Lender Address

Contact Name Tel No

Email Address

Loan Amount Term years

Interest Rate % Repayment Frequency Monthly Quarterly

Is there to be an interest only period? Yes No If yes, please confirm the term months/years

Lender's Solicitor

Company Name

Address

Postcode

Contact Name Tel No

Email Address

7 Lease Information

Is the tenant a connected party?

 Yes No

Existing Lease

Company Name

Address

Postcode

Contact Name

Tel No

Email Address

Lease Start Date

Term

years

Current Annual Rent

£

Repayment Frequency

 Monthly Quarterly

Is this lease to remain after the purchase?

 Yes No

New Lease

Company Name

Address

Postcode

Contact Name

Tel No

Email Address

Lease Start Date

Term

years

Annual Rent

£

Repayment Frequency

 Monthly Quarterly

Tenant's Solicitor

Company Name

Address

Postcode

Contact Name

Tel No

Email Address

8 Professional Appointments

Solicitor

Company Name

Address

Postcode

Contact Name

Tel No

Email Address

Surveyor

Company Name

Address

Postcode

Contact Name

Tel No

Email Address

Financial Adviser

Company Name

Address

Postcode

Contact Name

Tel No

Email Address

Do you wish your Financial Adviser to receive remuneration for this transaction? Yes No

Amount

£

or Percentage of purchase price

%

Vendor

Company Name

Address

Postcode

Contact Name

Tel No

Email Address

Vendor's Solicitor

Company Name

Address

Postcode

Contact Name

Tel No

Email Address

Sales Agent

Company Name

Address

Postcode

Contact Name

Tel No

Email Address

12 Member Declaration

I/We confirm that I/we have read the purchase property guide and understand the following:

I/We confirm that I/we wish to purchase the property as an investment in my pension scheme.

All instructions to the aforementioned firms must be instructed by Yorssas (Trustees) Ltd and that I/we cannot make a binding agreement or contract on behalf of Yorssas (Trustees) Ltd

Member Trustees will instruct the aforementioned firms, individuals and companies in connection with the property purchase. The instructions will be in the name of the scheme. No binding agreement or contract shall be made on behalf of Yorssas (Trustees) Ltd without their written consent.

I/We understand that Yorssas (Trustees) Ltd or Yorssas Ltd do not have responsibility for the performance of the said companies.

I/We understand that incorrect, or failure to disclose, information may delay the purchase. Where it is contrary to current legislation this may lead to tax penalties.

Yorssas (Trustees) Ltd shall have no personal liabilities under any covenants, obligations on its part contained in any documentation, whether express or implied, relating to the property. The liabilities of Yorssas (Trustees) Ltd shall be limited to the extent of the assets for the time being held under the pension arrangements of the members signing this application under the scheme.

I/We undertake not to make any claim against Yorssas (Trustees) Ltd in respect of any defect in title, state, or condition of the property and/or resulting from the management, repair, refurbishment, development, value marketability of the property, or otherwise.

Please provide details of the SSAS member who is the nominated member for contact:

All correspondence will be sent by email, where appropriate, please provide a contact email address:

It is the responsibility of the nominated member to inform all SSAS members of information provided.

The nominated member will also be the contact for all post purchase correspondence, unless notified to us in writing and agreed by all SSAS members.

If a Syndicate Agreement is entered into it is the members responsibility to ensure it is suitable for their needs.

I/We the member(s) give authority for you to provide copies of the property account and all relevant information to any of the participating members.

I/We confirm the nominated member may give instructions on behalf of the SSAS regarding all matters including bank borrowing, lease agreements etc.

Signature

Date

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13 Appendix I

Member Name

Title	Forename(s)	Surname
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Member Reference

Signature

Member Name

Title	Forename(s)	Surname
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Member Reference

Signature

Member Name

Title	Forename(s)	Surname
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Member Reference

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Member Name

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Member Reference

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Member Reference

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Member Reference

Signature

Member Name

Title	Forename(s)	Surname
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Member Reference

Signature



PENSION ADMINISTRATORS

Eadie House, 74 Kirkintilloch Road, Bishopbriggs, Glasgow G64 2AH

Tel 0141 772 3365 Fax 0141 762 1862

Email: info@yorssas.com

Web: www.yorsipp.com

Registered Office: c/o Calvert Dawson Ltd., 288 Oxford Road, Gomersal, Cleckheaton BD19 4PY Registration number 08487141