



Georgina Martin <georginam@retirement.capital>

Re: Unit 2 & Rear of Somers Road, Rugby CV22 7DG

CATHRYN MASON <cathrynmason278@yahoo.co.uk>
Reply-To: CATHRYN MASON <cathrynmason278@yahoo.co.uk>
To: Bejul Lakhani-Lever <bejul.lakhani-lever@btj.com>
Cc: Georgina Martin <georginam@retirement.capital>

Mon, Jun 12, 2023 at 1:44 PM

Dear Bejul,

We would like your firm to act for us for all three of the above. However, as discussed, the purchase of Unit 6 has not yet been agreed. If it does go ahead, I can confirm there will be no VAT payable on the purchase.

You can see I have copied in Georgina Martin, our contact at the pension administrator, Retirement.Capital. Could the invoice for the purchase of Unit 2 be made out and sent to them please? I shall copy both you and Georgina into emails I send.

I believe from the deeds that both Unit 2 and Unit 6 were built in 1965. The recent valuation said that the current rental value is £15,600.00 per annum. Would you like a copy of this valuation?

Last week you mentioned the need for an EPC which is being done as I write and this should be emailed to me tomorrow.

As I explained last week, time is of the essence or we will miss out on the opportunity to buy Unit 6.

Many thanks for your help,

Cathryn Mason

On Monday, 12 June 2023 at 10:28:36 BST, Bejul Lakhani-Lever <bejul.lakhani-lever@btj.com> wrote:

Dear Cathryn,

Many thanks for your time on Thursday.

I understand that you currently own unit 2 in your and your husband's personal names and you are looking to sell the property to your pension fund – Mason Family Pension Fund (SASS). I understand the sale is for £260,00 and you would like this firm to deal with the sale and purchase element. Your company, People Express Taxi's Limited are

currently in occupation and thus a lease will need to be put in place between them and the company upon completion. Your pension fund will require this. I understand that the purchase will not be subject to a mortgage and VAT is not payable on the purchase price.

From the proceeds for sale, you and your husband will be looking to purchase a further unit (unit 6) for circa £245,000.00 although this purchase is not yet agreed. This is cash purchase. Please would you confirm if VAT is payable on the purchase price? I understand the unit is currently vacant and you will be looking to let the same.

All properties are Freehold.

My colleague Amanpreet Dhadwal will deal with the sale, and I will deal with both purchases. The work we will be required to do will involve the following:

Sale at £260,000 from Mr & Mrs Mason to the SASS

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1. Reviewing the Freehold Title to the Property.
2. Draft, negotiate and finalise Contract for Sale.
3. Taking your instructions in relation to enquiries raised by the buyer's solicitors.
4. Providing replies to standard pre-contract enquiries raised by the buyer's solicitors together with additional replies to enquiries arising from their due diligence;
5. Draft, negotiate and finalise the Transfer Deed.
6. Report to you in relation to the Contract for Sale and Transfer Deed.
7. Exchange Contracts.
8. Complete the sale.
9. To include all attendances and correspondence throughout and is limited to the scope of work described above.

Please note that the work we do will not include any of the following:

1. Providing you with any form of tax advice.
2. Carrying out any site visits.
3. Arranging title Indemnity Insurance.
4. Mortgage or security requirements.
5. Liaising with any third parties other than you and the buyer's solicitors.
6. We do not advise on the commerciality of the transaction or any valuation points, neither do we comment on the state of repair or condition of the Property, and we therefore recommend that you seek advice about the same from a surveyor; and
7. Anything not specifically set out in the scope of work described above.

Based on the information above, I estimate our fees to be in the region of **£2000-2500 plus VAT and disbursements**. If it is necessary to increase this figure and review the rate, we will discuss the same with you in good time

Purchase at £260,000 from Mrs and Mrs Mason by the Pension Fund:

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1. Reviewing the freehold title to the Property
2. Obtaining replies to pre-contract enquiries me;
3. Carrying out searches.
4. Drafting and finalising the lease from the pension fund to the Company in accordance with the pension funds requirements.
5. Raise enquiries on matters arising out of our due diligence as noted above.
6. Review, negotiate and finalise the Contract for Sale.
7. Review, negotiate and finalise the Transfer Deed.
8. Providing you and the pension fund with a report on title to cover to freehold title, searches, enquiries and lease.
9. Raise pre-completion enquiries with the Seller's solicitors.
10. Finalise the Contract for Sale, Transfer Deed and Lease provide the same to you for signature.
11. Complete the SDLT return on your behalf and submit the same within 14 days of completion provided we are in receipt of funds from you in relation to any SDLT payable;
12. Carry out pre-completion searches at the Land Registry.
13. Exchange and complete the matter; and
14. Register the transfer at the Land Registry

And is limited to the scope of work described above.

1. Providing you with any form of tax advice.
2. Carrying out any site visits.
3. Arranging title indemnity insurance.
4. Mortgage or security requirements.
5. Liaising with any third parties other than you, the pension fund, and the seller's solicitors.
6. We do not advise on the commerciality of the transaction or any valuation points, neither do we comment on the state of repair or condition of the Property, and we therefore recommend that you seek advice about the same from a surveyor; and
7. Anything not specifically set out in the scope of work described above.

Our estimate for dealing with the purchase is **£3000 plus VAT and Disbursements and the Lease element will be a further £950-1250 plus VAT and disbursements**. If it is necessary to increase this figure and review the rate, we will discuss the same with you in good time

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Subsequent Purchase by Mr & Mrs Mason at £245,000.00

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1. Reviewing the freehold title to the Property
2. Obtaining replies to pre contract enquiries.
3. Carrying out searches.
4. Raise enquiries on matters arising out of our due diligence as noted above.
5. Review, negotiate and finalise the Contract for Sale to you.
6. Review, negotiate and finalise the Transfer Deed.
7. Providing you with a report on title to cover to freehold title, searches, and enquiries.
8. Raise pre completion enquiries with the Seller's solicitors.
9. Finalise the Contract for Sale and Transfer Deed provide the same to you for signature.
10. Complete the SDLT return on your behalf and submit the same within 14 days of completion provided we are in receipt of funds from you in relation to any SDLT payable.
11. Carry out pre completion searches at the Land Registry.
12. Exchange and complete the matter; and
13. Register the transfer at the Land Registry

And is limited to the scope of work described above.

1. Providing you with any form of tax advice).
2. Carrying out any site visits.
3. Arranging title indemnity insurance.
4. Mortgage or security requirements.
5. Preparing any leases to any occupiers – these would be charged for separately.
6. Liaising with any third parties other than you, the agents and the seller's solicitors.

7. We do not advise on the commerciality of the transaction or any valuation points, neither do we comment on the state of repair or condition of the Property and we therefore recommend that you seek advice about the same from a surveyor; and
8. Anything not specifically set out in the scope of work described above.

Our estimate for dealing with the purchase is **£2,500 - 3000 plus VAT and Disbursements**. If it is necessary to increase this figure and review the rate, we will discuss the same with you in good time

The charges set out in this email have been calculated on the assumption that the work will not prove to be substantially more complex or time consuming than can be reasonably foreseen by us on the basis of the information which you have been able to give us. If unforeseen additional work becomes necessary, then we will discuss with you at that stage the likely additional charges for the extra work.

Should you have any queries please do not hesitate to contact me.

Kind Regards,

Bejul

BEJUL LAKHANI-LEVER

Property Solicitor, Commercial

Brindley Twist Tafft & James LLP

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Web: <http://www.bttj.com>

**Please note my working hours are Monday,
Tuesday and Thursday 9.00am – 4.45pm**



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13/06/2023, 11:43

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