



Small Self-Administered Scheme

# Property Application Form

## Before you start

This form should be used to provide us with sufficient information to consider whether a proposed property purchase would be acceptable into the SSAS. Until the application form is fully completed, signed and returned to us we cannot proceed with the purchase.

It is important that you read our Property Guidance Notes before completing the application form as this will provide you with the details of our various requirements.

Please ensure you complete all relevant sections. Your completed form should be returned to:

Pension Practitioner  
georginas@pensionpractitioner.com

## Contact Information

Scheme Name	Rocky Asset Management Limited Pension Scheme
Main Contact Name	Helen Yates
Contact Address	C/O Yates Drywall, Norec House, Fall Bank Industrial Estate, Dodworth, Barnsley, S75 3LS
Daytime Telephone	07766201467

## Property Details

Property Address <small>(or land details if this is a land only purchase)</small>	Pentecostal Church, Wombwell, Barnsley, S73 8HY		
Type of Property	Chapel converted to offices/studio		
Purchase Price	150,000		
Proposed Completion Date	01.05.2021		
Is the title registered?	<input checked="" type="radio"/> Yes / <input type="radio"/> No	Circle as appropriate	
Is the building listed?	<input type="radio"/> Yes / <input checked="" type="radio"/> No	Circle as appropriate	
Freehold or Leasehold?	<input checked="" type="radio"/> Freehold / <input type="radio"/> Leasehold	Circle as appropriate	
<b>Leasehold Only</b>	i) Outstanding term of lease		
	ii) Ground Rent payable		
Property Age	Built late 19th century		
Is the property subject to VAT?	<input type="radio"/> Yes / <input checked="" type="radio"/> No	Circle as appropriate. Please include VAT figure in Purchase Price if applicable.	
Is there any residential element?	<input type="radio"/> Yes / <input checked="" type="radio"/> No	Circle as appropriate - if yes, please provide details on the occupant on the Additional Details page	
Is the vendor connected with the member(s) or sponsoring employer	<input type="radio"/> Yes / <input checked="" type="radio"/> No	Circle as appropriate - if yes, please provide details of the connection / relationship on the Additional Details page	

### Contact Details for VAT (if applicable)

Please complete this section in relation to the individual dealing with the VAT on behalf of the pension scheme

Main Contact Name

Contact Address

Daytime Telephone

Email Address

### Vendors Details

Contact Name

Contact Address

Daytime Telephone Number

Email Address

### Schemes Solicitor Details

Pension Practitioner can arrange for an introduction to be made to a solicitor who is experienced in pension scheme law, to act on behalf of the trustees of the pension scheme. Alternatively you can supply details of your own Solicitor in the additional information section of page 6

### Vendors Solicitor Details

Contact Name

Practice Name

Practice Address

Telephone Number

Email Address



## Costs

Purchase Price	£ 150,000
VAT (if applicable)	£
Stamp Duty Land Tax	£
Legal / professional costs (incl VAT)	£ tbc
<b>Total Cost</b>	<b>£ 150,000 plus legal fees</b>

## Loan Details (if applicable)

Please complete this section in relation to the firm and individual dealing with the loan to the pension scheme

Lender Contact Name	
Lender Address	
Lender Telephone	
Email Address	
Amount of Loan	£
Term of Loan	
Repayments Expected	

We will require a copy of the offer letter once this is available

## Funding the Purchase

Please use this section to detail how the property purchase is to be funded

For example: Scheme value is £150,000. A gross contribution of £25,000 from member A and an additional transfer-in of £82,000 from member B

Property purchase to be funded from funds in Pension Scheme Bank Account.

## Property Management

We insist that a property manager is in place and responsible for the day-to-day management of the property. It is acceptable for one (or more) of the member trustees to complete this function. Please confirm the property managers details.

Contact Name	Adam Yates and Wayne Crossland
Contact Address	C/O Yates Drywall Ltd, Norec House, Dodworth, Barnsley, S75 3LS
Daytime Telephone	07943 267926 / 07534 377774

## Existing Tenant Details (if applicable)

Business Name / Contact	Alexander Bartles and Richard Snoman	
Company Number		
Registered Address	Pentecostal Church, Cemetery Road, Wombwell, Barnsley, S73 8HY	
Telephone Number	07485 687961	
Is the tenant connected with the member(s), or sponsoring employer?	Yes / <input checked="" type="radio"/> No	Circle as appropriate - if yes, please provide details of the connection / relationship on the Additional Details page
Is the tenant VAT registered?	Yes / <input checked="" type="radio"/> No	Circle as appropriate
Is the tenant exempt for VAT purposes	Yes / <input checked="" type="radio"/> No	Circle as appropriate
Rent payable and frequency	Annual Cost £13500 (£1125 paid monthly)	
Are the rental payments up to date?	<input checked="" type="radio"/> Yes / No	Circle as appropriate

### Proposed Tenant Details (if applicable)

Business Name / Contact

Company Number

Registered Address

Telephone Number

Is the tenant connected with the member(s), or sponsoring employer?

 / 

Circle as appropriate - if yes, please provide details of the connection / relationship

Is the tenant VAT registered?

 / 

Circle as appropriate

Is the tenant exempt for VAT purposes?

 / 

Circle as appropriate

Rent payable and frequency

Are the rental payments up to date?

 / 

Circle as appropriate

### Checklist

Property Valuation

 / 

Circle as appropriate

Copy of existing lease

 / 

Circle as appropriate

Rental Valuation

 / 

Circle as appropriate

Energy Performance Certificate

 / 

Circle as appropriate

**If you have not yet been provided with an Energy Performance Certificate for the property please request this from the vendors. We will require a copy for our records before the property can complete.**

### Additional Information


Please use this section to provide any additional information such as the Solicitor who is to represent the pension scheme, residential details OR connections / relationships.


Valuation and tenancy previously sent by email but attached to email again. EPC completed last week and waiting for report so will forward on receipt. ( Did not previously require EPC when building was a place of workshop before use change)

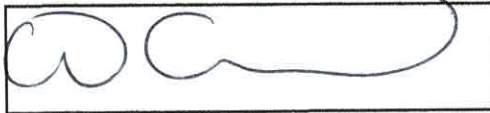


## Declaration

I/we confirm that I/we have read, understood and agree to abide by the terms and conditions set out in the Property Guidance Notes and that the information supplied in the questionnaire is correct to the best of my/our knowledge and belief.

Signature		Print Name	Adam Yates
Position	Trustee	Date	11.02.2021

Signature		Print Name	Helen Yates
Position	Trustee	Date	11.02.2021

Signature		Print Name	Wayne Crossland
Position	Trustee	Date	11.02.2021

Signature		Print Name	
Position		Date	