



Property Data Form

PART A - CONTACT INFORMATION

Scheme Name: _____

Contact Name: _____

Contact Email: _____

PART B - PROPERTY INFORMATION

1st Line of Property Address: _____

Post Code: _____

How will be property be used: _____

Premises: Leasehold Freehold

Annual Ground Rent (if applicable): _____

Proposed Date of Completion or Exchange of Contracts: _____

Is there an Asbestos Record/ Report available? Yes No

Does the Property include residential accommodation? Yes No

Will any Refurbishment Costs be met by the SSAS? Yes No

PART C - PROPERTY PURCHASE/TRANSFER

Is Purchase subject to VAT? Yes No

If this is a property transfer and not a sale, is there mortgage? Yes No

Outstanding Amount of Loan (if yes): _____

Name(s) of Seller _____

Is the Seller connected to anyone in the SSAS or the Principal Employer. Yes No



Lender Details:

Name: _____

Mortgage Account Number: _____

Mortgage Due Date: _____

PART D - FUNDING INFORMATION

Purchase Price (excluding VAT): _____

Development Costs (excluding VAT): _____

VAT (if applicable): _____

TOTAL: _____

Are the Trustees to 'VAT opt' the property? Yes No

Is this to be treated as a Transfer of a Going Concern? Yes No

PART E - TRUSTEE BORROWING

Lending Source: _____

Contact Name: _____

Email Address: _____

Address: _____

Amount of Loan:

PART F - LEASE INFORMATION

Existing Lease:

Tenant: _____

Rent Amount (for full year): _____

Start Date of Lease: _____

Is this Lease to continue after the purchase? Yes No



New Lease (if applicable):

Proposed Tenant: _____

Rental Amount (for full year): _____

PART G - SOLICITOR INFORMATION (If you have already appointed a solicitor, please complete this form)

Your Solicitor's Details:

Solicitor's Name: _____

Contact Name: _____

Telephone Number: _____

Email Address: _____

Please attach the following items for a **new property** purchase:

- Terms of Sale Agreement (this will be supplied by your agent)
- Copy of the Lease (where a lease is being transferred)
- Property valuation
- EPC Report

Please attach the following items for a **property transfer** from another pension fund:

- Copy of the current buildings insurance
- Copy of the lease
- Most recent property valuation report
- EPC Report