

1 Introduction

This questionnaire should be completed for each property that is to be purchased.
 If more than one member is purchasing the property the additional members should complete Appendix 1 on page 7.
 Please note that making a false declaration on this application can have serious consequences.

2 Member Information

Member Name	Title	Forename(s)	Surname
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Member Number

Please indicate here if this is to be a Group Purchase 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? Yes No
 If yes please provide details at section 9

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 property? Yes No
 Is the purchase to be treated as a transfer of a going concern? Yes No

Please note the property 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

Email Address

Loan Amount

Interest Rate

Is there to be an interest only period?

Yes

No

If yes, please confirm the term

months/years

Postcode		
Contact Name	Tel No	
Email Address		

£	Term		years
Interest Rate		Repayment Frequency	<input type="checkbox"/> Monthly <input type="checkbox"/> Quarterly

Lender's Solicitor

Company Name

Address

Contact Name

Email Address

Postcode		
Contact Name	Tel No	
Email Address		

7 Lease Information

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

Contact Name

Email Address

		Postcode
	Tel No	

Surveyor

Company Name

Address

Contact Name

Email Address

		Postcode
	Tel No	

Financial Adviser

Company Name

Address

Contact Name

Email Address

		Postcode
	Tel No	

Vendor

Company Name

Address

Contact Name

Email Address

		Postcode
	Tel No	

Vendor's Solicitor

Company Name

Address

Contact Name

Email Address

		Postcode
	Tel No	

Sales Agent

Company Name

Address

Contact Name

Email Address

		Postcode
	Tel No	

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.

Yorsipp (Trustees) Ltd will instruct the aforementioned firms, individuals and companies in connection with the property purchase. I/we understand that Yorsipp do not have responsibility for the performance of the said companies.

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

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.

Yorsipp 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 Yorsipp shall be limited to the extent of the assets for the time being held under the pension arrangements of the member signing this application under the scheme.

I/We undertake not to make any claim against Yorsipp 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.

I/We confirm where the property purchase is on behalf of more than one member that Yorsipp may disclose information relating to the property to all members and their agents.

Where the purchase is on behalf of more than one member the nominated member for contact is:

Signature

Date

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11 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

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Member Reference

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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



PENSION ADMINISTRATORS

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