

Borrowing Information Schedule

Rowanmoor SIPP

Commercial Property Guide

Property Information Schedule

Borrowing Information Schedule

Guide to Retained Solicitors' Fees

This is part of a set of literature, all of which should be read together if borrowing is associated with commercial property purchase through a self-invested personal pension (SIPP).

Name of SIPP

SIPP Reference Number
(if known)

Please complete the Borrowing Information Schedule in full using BLOCK CAPITALS and dark ink. There are notes to help you.

The information supplied will be held in the strictest confidence and subject to the provisions of Data Protection Legislation.

Any omission could delay the proposed borrowing which could, if required for a property purchase, also delay that transaction.

Please ensure you complete, sign and date the Declaration on page three before returning the completed schedule to us.

Borrowing Information Schedule

Lender's details

Contact name, company name and address of lender.

Contact Name	<input type="text"/>		
Company Name	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
Country	<input type="text"/>	Postcode	<input type="text"/>
Telephone Number (inc. area code)	<input type="text"/>	Fax Number (inc. area code)	<input type="text"/>
Email	<input type="text"/>		

Please refer to the Rowanmoor SIPP Commercial Property Guide for a definition of a connected party.

Is the lender in any way connected to you or any company contributing to the SIPP?

YES NO

If you have ticked 'YES' above, please detail the connection below

Documentation

Please confirm what documents have already been prepared.

If the following have already been supplied, please forward copies when returning this schedule and tick the relevant boxes to confirm their enclosure.

Facility/Offer Letter

Legal charge

Other
(please specify)

Reason for borrowing

If the borrowing is to finance a property purchase please ensure you also complete a Property Information Schedule.

to assist in the purchase of property

other (please specify the reason and what will be used as security)

Borrowing and repayment terms

If the borrowing is required to assist with a property purchase VAT may be payable and you may need to register for VAT. Please refer to the Rowanmoor SIPP Commercial Property Guide for more information.

If the borrowing is to fund a property purchase, it is usual for the rent received on the property to be set at a level that will cover the mortgage commitments, while still reflecting a commercial rate.

Declaration

This is our standard Borrowing Information Schedule upon which we intend to rely. For your own benefit and protection you should read the declaration carefully before signing. If you do not understand any point please ask for further information or seek advice from a suitably qualified professional.

To be signed by the member.

Amount to be borrowed

Please confirm the terms of the borrowing:

Repayment frequency

Monthly Quarterly Annually Other (please specify)

Periodic repayment amount

Term

Interest rate or Base rate plus

Are arrangement, security or any other fees included in the amount to be borrowed?

YES NO

If you have ticked 'YES' above, please provide details below

How will the repayments be funded?

As a member of a Rowanmoor SIPP I confirm that:

I have taken written advice on the suitability of the borrowing, a copy of which is provided.

The above information is, to the best of my knowledge, true and complete and no material details have been omitted.

I authorise the use of the information contained in this schedule to be disclosed to relevant parties.

I have read and understood the Rowanmoor SIPP Commercial Property Guide (where applicable).

I authorise Rowanmoor Personal Pensions Limited to give and request information necessary to complete this transaction and comply with HM Revenue & Customs requirements.

Signature

Print Name

Date

 03445 440 440

 03445 440 500

 enquiries@rowanmoor.co.uk

 rowanmoor.co.uk

Rowanmoor Executive Pensions Limited (No. 5792242), Rowanmoor Personal Pensions Limited (No. 2268900) and Rowanmoor Trustees Limited (No. 1846413) are companies registered in England at Rowanmoor House, 46-50 Castle Street, Salisbury SP1 3TS. Rowanmoor is a trading name of the Embark Group.

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If you require this document in audio, large print or Braille format, please telephone 03445 440 550 or fax 03445 440 500.