

borrowing information schedule

SIPP details

Name of SIPP

SIPP Reference Number
(if known)

Please complete the Self-Invested Personal Pension (SIPP) Borrowing Information Schedule in full using BLOCK CAPITALS and dark ink. There are notes to help you. 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 before returning it to us.

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



Rowanmoor Pensions

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. STD code)	<input type="text"/>	Fax Number (inc. STD code) <input type="text"/>
Email	<input type="text"/>	

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.

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 %

borrowing and repayment terms (continued)

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.

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?

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 independent advice.

As a member of a Rowanmoor Pensions Self-Invested Personal Pension 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 Pensions SIPP Commercial Property Guide (where applicable).

I authorise Rowanmoor Pensions to give and request information necessary to complete this transaction and comply with Her Majesty's Revenue and Customs requirements.

To be signed by the member.

Signature

Print Name

Date

D	D	M	M	Y	Y
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