

property information schedule

SIPP details

Name of SIPP

SIPP Reference Number
(if known)

Please complete the Self-Invested Personal Pension (SIPP) Property Information Schedule in full using BLOCK CAPITALS and dark ink. There are notes to help you. Any omission could delay the proposed property transaction.

Please ensure you complete, sign and date the Declaration before returning it to us. If borrowing is required to help fund the property purchase, please ensure that a completed Borrowing Information Schedule is returned at the same time.

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



Rowanmoor Pensions

the property

Please provide a brief description of the property, e.g. land for development, shop, factory, warehouse, office, etc.

If the property is leasehold please provide the name and address of the landlord and a copy of the lease.

Please complete if the intended use is different from the description given above.

If the land is for development, please provide the name and address of the individual or company who has been awarded the contract to develop it.

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

Where there is a connection, independent quotations will be required from three different contractors (including the connected party) to ensure all work is carried out on a commercial basis.

If you have ticked 'YES' in the box opposite, please provide a copy of the survey.

Address of the Property

 Postcode

Estimated date of exchange of contracts

 Description of the Property

Is the property freehold or leasehold? Freehold Leasehold

Name

Address

Postcode

Telephone Number (inc. STD code) Fax Number (inc. STD code)

Email

What is the commencement date of the existing lease?

What is the outstanding term of the lease? years

Under the terms of the lease what is the current annual ground rent to be paid by the tenant? £

What is the approximate construction date of the property?
 SINCE 1999 1950 - 1998 PRE 1950

What is the property currently used for?

What is the intended use of the property e.g. land for development, shop factory, warehouse, office, etc?

Is the purchase for land only? YES NO

Is the land fenced? Fully Partially Not at all

Is the land free of obstacles? YES NO

Does the land have a public right of way across the plot? YES NO

If the purchase is land for development, has planning permission been obtained to build on the land?
 YES NO

Name

Address

Postcode

Telephone Number (inc. STD code) Fax Number (inc. STD code)

Email

Is there any connection between the developer and you or any company contributing to the SIPP?
 YES NO

If 'YES', please provide details of the connection

To the best of your knowledge has the site ever been subject to a full environmental survey?
 YES NO

the property (continued)

Will the intended use, or has any previous use, involved any process, or material that could reasonably be construed as a potential pollutant? YES NO

If 'YES', please provide **full** details

Are there any known claims or incidents of an environmental nature in respect of the property or any surrounding property?

YES NO

If 'YES', please provide any details available

Is the property located in a residential area? YES NO

If yes, is there any Plant being used at the property? YES NO

Is the site located on or near a waterway? YES NO

The asbestos management plan is: Attached to this schedule Not required

Rowanmoor Pensions will need a copy of the asbestos management plan (AMP) or appropriate evidence that one is not required, before contracts can be exchanged.

The vendor will be expected to supply a copy of an Energy Performance Certificate or Display Energy Certificate for the building, if appropriate, in accordance with the Energy Performance of Buildings (Certificates and Inspections) Regulations. For more information please refer to the Rowanmoor Pensions SIPP Commercial Property Guide.

What Energy Performance Certificate will the vendor supply?

Energy Performance Certificate Display Energy Certificate None

If 'NONE', please provide the reason below:

financing the purchase

A professional independent survey report and valuation carried out by a RICS qualified surveyor will be required to support the purchase price and ensure that the property is an acceptable investment. This must not be more than six months old and must be addressed to the trustees. Rowanmoor Pensions has specific requirements for the contents of a report, please refer to the Rowanmoor Pensions SIPP Commercial Property Guide.

Purchase Price (net)

Fees and disbursements

If the purchase price is subject to VAT please confirm the amount of VAT to be added.

TOTAL

If you have ticked 'YES' opposite, please provide the name and address of the person who will be completing your VAT returns.

Is the SIPP sub-trust to register for VAT? YES NO

Name

Address

Postcode

Telephone Number (inc. STD code) Fax Number (inc. STD code)

Email

financing the purchase (continued)

Please indicate the proposed method(s) of funding the purchase.
If borrowing is required, please also return a completed borrowing information schedule.

Balance of funds will be provided from the following sources:

Contribution(s)

Encashment of existing SIPP investments

Borrowing

Transfer from other pension arrangement

Existing cash

Other (please specify)

TOTAL

If you are borrowing to finance the purchase, please provide the contact name, company name and address of the lender.

Contact Name

Company Name

Address

Postcode

Telephone Number
(inc. STD code)

Fax Number
(inc. STD code)

Email

the vendor

Please provide the name and address of the vendor.

Name

Address

Postcode

Telephone Number
(inc. STD code)

Fax Number
(inc. STD code)

Email

Please note that connected party transactions have specific requirements set by Her Majesty's Revenue and Customs (HMRC).

Is there any connection between the vendor and you or any company contributing to the SIPP?

YES

NO

If 'YES', please provide details of the connection below:

Please provide the contact name, company name and address of the vendor's solicitor.

VENDOR'S SOLICITOR

Contact Name

Company Name

Address

Postcode

Telephone Number
(inc. STD code)

Fax Number
(inc. STD code)

Email

the tenant

Is the property subject to an existing lease? If so, please provide the name of the current tenant and a copy of the lease.

Please provide the name of the proposed tenant if different from above.

Please note that connected party transactions are subject to specific requirements set by HMRC. For more information please refer to the Rowanmoor Pensions SIPP Commercial Property Guide.

A professional independent rental valuation carried out by a RICS qualified surveyor will be required in all cases

If there is more than one tenant please give details in the notes section on page 8.

insurance

Insurance for properties will be arranged from exchange of contracts, through Rowanmoor Pensions Property Insurance Policy.

This is the amount of rent set in the lease.

This is communal content.

The policy provides a standard cover limit of £5 million. Please confirm the amount if you wish to increase this limit for an additional cost.

Please note that the policy is renewed annually on 1 May each year. Therefore, if establishing the policy mid-year the initial premium will be calculated on a pro-rata basis. More details can be found in the Rowanmoor Pensions SIPP Property Insurance Policy Key Features document.

Please tick the box to confirm a photograph is attached.

Please confirm the construction details of the property.

You should be able to find this information on the property sales leaflet.

Name of existing tenant and nature of the tenant's business

Name of proposed tenant and nature of the tenant's business

Is the property to be leased back to any connected party?

YES

NO

If 'YES', please detail the connection below:

Building reinstatement value?

Rent sum assured?

Content sum assured? (if applicable)

Property owners' liability limit of indemnity.

Photograph attached

Is there going to be a mortgage attached to the property?

YES

NO

If 'YES' please confirm the lender's name and address if interest is to be noted and detailed on page 5.

Is the property currently occupied?

YES

NO

If 'NO' is the property being actively marketed to let?

YES

NO

What security measures does the property have?

If the property is vacant, what is its intended use?

If the property is vacant, when is it anticipated the property will be re-let?

Floor construction

Concrete

Timber

Steel

Other (please indicate)

Roof construction

Concrete

Pitched tile

Flat felt

Other (please indicate)

Wall construction

Brick

Concrete

Part brick/block

Corrugated metal

Corrugated asbestos

Part brick/tile

Other (please indicate)

Frame construction

Steel

Concrete

Part brick/block

Brick

Other (please indicate)

What is the age of the property?

Is the property listed? YES NO UNKNOWN
 If "YES" what is the grade of listing? Grade 1 Grade 2

Has the property ever suffered as a result of flood, subsidence, landslip or heave? YES NO UNKNOWN

Is the property built on made up ground? YES NO UNKNOWN

Please confirm the number of storeys the property has.

Does the property have an Atrium? YES NO UNKNOWN

Are sprinklers installed and operational? YES NO UNKNOWN

Are there any cooking facilities? YES NO UNKNOWN

If 'YES', please provide details of the facilities.

Is an automatic sprinkler system installed and maintained in accordance with The Loss Prevention Council Rules for Automatic Sprinkler Installations 29th Edition?

If 'YES', is the cooking and extraction equipment maintained? YES NO UNKNOWN

Are there any composite panels? YES NO UNKNOWN

If 'YES', where are they located and are they LCPB (Loss Prevention Certification Board) approved?

Is the cooking and extraction equipment regularly inspected and maintained by a competent person or firm?

Please provide details of any trees located on or near the property.

Please provide details of any claims or losses which have affected the property during the last 5 years.

optional cover

Please tick the boxes to indicate if you require the optional cover shown opposite for an additional cost.

This will usually only be applicable if there are communal areas within the building and is usually covered within the lease. However, if the service charge is agreed outside of the lease please confirm the amount of the sum assured required.

Terrorism insurance YES NO

Employer's liability YES NO

Service charge sum assured? (if applicable)

Service charge indemnity period months

additional insurances

As an additional service, Lockton Companies International Limited is able to offer engineering insurance and engineering inspection on lifts and boilers separate to this policy. Please tick to confirm if you would like a quotation on either of these insurances for an additional cost and provide details of any plant and machinery you would like insured.

Engineering inspection YES NO

Engineering insurance YES NO

Details of plant/machinery to be insured

notes

declaration

Please note that it is your duty to disclose any information that might influence the insurers/reinsurers in fixing the premium or determining whether to accept the risk. Please provide as much information as possible. If the information is unknown then please state Unknown.

This is our standard Property Information Schedule upon which we intend to rely. For your own benefit and protection you should read the Rowanmoor Pensions SIPP Commercial Property Guide carefully before signing. If you do not understand any point please ask for further information or seek independent advice.

To be signed by the SIPP member.

As a Member of a Rowanmoor Pensions Self-Invested Personal Pension I confirm that:

I have taken written advice on the suitability of the investment, 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 request the purchase of the property as an investment by my SIPP and authorise 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.

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

I instruct Rowanmoor Trustees Limited to arrange suitable property insurance, on behalf of the SIPP, the cost of this cover will be met by the SIPP.

Signature

Print name

Date

D	D	M	M	Y	Y
---	---	---	---	---	---



TELEPHONE: 08445 440 440 • FAX: 08445 440 500
enquiries@rowanmoor.co.uk • www.rowanmoor.co.uk

ADMINISTRATION CENTRES

ROWANMOOR HOUSE • 46-50 CASTLE STREET • SALISBURY SP1 3TS
2 BELMONT HOUSE • DEAKINS BUSINESS PARK • EGERTON • BOLTON BL7 9RP

CONSULTANCY OFFICES

LONDON | BOLTON | BURGESS HILL | SALISBURY

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

Rowanmoor Personal Pensions Limited is authorised and regulated by the Financial Services Authority.

If you require this document in audio tape, large print, Braille or PC disc format, please telephone 08445 440 550 or fax 08445 440 500.