


A large green circle graphic is positioned in the middle right of the page, overlapping the bottom of the blue circle and the top of the plant image. It contains the title text in white.

# PROPERTY QUESTIONNAIRE

A background image of several small green seedlings with two leaves each, growing in a field. The image is slightly blurred and has a soft, natural light feel.

We're here to help should you have any queries.  
Call us on 0117 457 7784.

**The purpose of this form is to assess whether the proposed property investment is proceedable.**

Please complete the questionnaire as fully as possible and return it to:

Morhart Pension Services Ltd  
Unit G6, Temple 1852  
Lower Approach Road  
Temple Meads  
Bristol  
BS1 6QS

**If you have any queries regarding the completion of the form, please contact the Morhart team on 0117 457 7784.**

## Form Sections

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# 1 Scheme Details

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Scheme name

Scheme reference

# 2 Property Details

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Address

Postcode

Description/use of the property  
*(e.g. office, public house or light industrial)*

Is the title registered?

Yes

No

Freehold or Leasehold?

Freehold

Leasehold

### If leasehold, please confirm the following

Ground rent payable (£ p.a)

Outstanding term of lease (years)

Approximate age of property (years)

Is the property vacant or is there an existing tenant?

Vacant possession

Existing tenant

Is the property subject to VAT?

Yes

No

Do you want us to register the SSAS for VAT?

Yes

No

Is there any residential element in the property\*?

Yes

No

- If yes, please provide full details including who will occupy the residential element of the property

Is the vendor connected to any SSAS member or sponsoring employer?

Yes

No

- If yes, please provide full details of the connection

If this is a connected transaction, please confirm which firm of chartered surveyors will provide an open market valuation of the property.

Does the property adjoin any property owned by the member trustees or connected parties?

Yes

No

- If yes, please provide full details:

### 3 Property Costs

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Purchase price	£
VAT (if applicable)	£
Stamp Duty Land Tax (SDLT)	£
Professional fees	£
Refurbishment costs	£
Total cost	£

How will the property investment be funded?

### 4 Vendor Details

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Name	<div style="border: 1px solid black; height: 20px;"></div>	
Address	<div style="border: 1px solid black; height: 40px;"></div>	
	Postcode	<div style="border: 1px solid black; width: 100px; height: 20px;"></div>
Telephone number	<div style="border: 1px solid black; height: 20px;"></div>	
Email	<div style="border: 1px solid black; height: 20px;"></div>	
Is the vendor a connected party?	Yes	No
- If yes, please provide full details of the connection	<div style="border: 1px solid black; height: 40px;"></div>	

### 5 Vendor's Solicitor

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Name	<div style="border: 1px solid black; height: 20px;"></div>	
Address	<div style="border: 1px solid black; height: 40px;"></div>	
	Postcode	<div style="border: 1px solid black; width: 100px; height: 20px;"></div>
Telephone number	<div style="border: 1px solid black; height: 20px;"></div>	
Email	<div style="border: 1px solid black; height: 20px;"></div>	

**The vendor's solicitor must be different to the solicitor acting for the trustees of the SSAS.**

## 6 SSAS Trustees' Solicitor Details

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Name		
Address		
	Postcode	
Telephone number		
Email		

## 7 Mortgage Provider (if applicable)

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**It is possible for the SSAS trustees to borrow from any UK commercial lender to assist with the funding of the property investment. We will need to receive full details of the mortgage and be party to the relevant documentation.**

Name		
Address		
	Postcode	
Telephone number		
Email		
Amount of loan (£)		
Monthly repayment (£)		
Term of loan		
Is it necessary to open a current account with the lender?	Yes	No
Is the offer letter supplied with this questionnaire?	Yes	No

## 8 SSAS Trustees' Surveyor Details

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**The trustees will require a valuation and report carried out by a suitably qualified firm of chartered surveyors. Please bear in mind that if there is a mortgage provider, they will have their own specific requirements and you should contact them separately in this regard.**

**Chartered surveyor acting for the SSAS trustees:**

Name		
Address		
	Postcode	
Telephone number		
Email		

## 9 Tenant Details

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Please provide the following information for any proposed or existing tenant:

Name

Address


Postcode

Telephone number

Email


Is the tenant a connected party?

Yes

No

If yes, please provide full details

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Annual rent and payment frequency  
*(If the tenant is connected, the level of rent will need to be supported by an open market rental valuation, carried out by a suitably qualified firm of chartered surveyors).*

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Proposed term of lease

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Is the tenant VAT registered?

Yes

No

Is the tenant exempt for VAT purposes?

Yes

No

**For an existing tenant:**

Is rent paid up to date?

Yes

No

- If no, please confirm rent arrears

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What is the remaining term of the lease?

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Please confirm any future break clauses

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## 10 Property Management

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Will the SSAS trustees appoint a third-party property manager?

Yes

No

**If yes, please confirm the following:**

Name

Address


Postcode

Telephone number

Email


**If the SSAS trustees do not wish to appoint a third-party property manager, they are jointly responsible for managing the property.**

## 11 Property Insurance

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**Please provide full details of who the SSAS trustees intend to use to insure the property. This can be any UK insurance company:**

Name

Address


Postcode

Telephone number

Email


# 12 Declarations

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**Please read the following declarations carefully and ensure that you fully understand them. We confirm as member trustees that:**

- All statements made and information provided is accurate to the best of my knowledge.
- We authorise Morhart Pension Services Ltd ('Morhart') to discuss the proposed SSAS investment with all third parties listed in the questionnaire.
- Morhart and associated companies have given no advice in relation to the suitability of this proposed investment. We accept that their liability shall be limited to the assets of the SSAS.
- We understand the risks associated with this investment and acknowledge the illiquid nature of the property investment.
- We accept full liability for any tax charges or penalties which are imposed by HMRC as a result of this investment.
- We believe that this is an acceptable pension scheme investment and will monitor this investment to ensure that it will not lead to tax charges.
- We confirm that we will have/obtained adequate insurance for the property and will provide Morhart with a copy of the relevant policy document.
- We confirm that if a third-party property manager is not appointed then the member trustees are responsible for all ongoing property management. We acknowledge that Morhart does not monitor the property on an ongoing basis.

Trustee full name	
Signature	
Date	

Trustee full name	
Signature	
Date	

Trustee full name	
Signature	
Date	

Trustee full name	
Signature	
Date	