



PROPERTY QUESTIONNAIRE

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 G8, 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.

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1 Scheme Details

Scheme name

Scheme reference

2 Property Details

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:

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6 SSAS Trustees' Solicitor Details

Name

Address

Postcode

Telephone number

Email

7 Mortgage Provider (if applicable)

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

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

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

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).

Proposed term of lease

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

What is the remaining term of the lease?

Please confirm any future break clauses

10 Property Management

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

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

**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	