



# TAKEOVER 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 existing freehold or long leasehold property asset within the Morhart SSAS ('SSAS') is compliant with HMRC's regulations and the Rules which govern the Scheme.**

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.**

## Form Sections

---

- 1 Scheme Details
- 2 Existing Property Details
- 3 Existing Scheme Borrowing
- 4 Existing Lease Details
- 5 SSAS Trustees' Solicitor's Details
- 6 SSAS Trustees' Surveyors Details
- 7 Property Management
- 8 Property Insurance
- 9 Declarations

## 1 Scheme Details

Scheme name

Scheme reference

## 2 Existing Property Details

Address

--

Postcode

--

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

--

Is the title registered?

Yes

No

If yes, HM Land Registry Title Number

--

Freehold or Leasehold?

Freehold

Leasehold

**If leasehold, please submit a copy of the headlease with this form and confirm the following:**

Copy of headlease enclosed

Enclosed

Ground rent payable

£

p.a.

Remaining balance of the headlease (in  
respect of the long leasehold)

years

Approximate age of property

years

Current or approximate market value of  
the property

£

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

HMRC VAT reg. number of the SSAS

--

Who deals with the ongoing VAT  
administration and the quarterly returns  
on behalf of the SSAS?

--

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

--

Yes

No

Is the property co-owned (jointly  
owned) with another party and, if so,  
with whom?

Name of co-owner

Percentage split

--

--

Are there any disputes or ongoing issues with the neighbours or with the tenant?

Yes

No

- If yes, please provide details:

--

Are there any outstanding insurance claims or rental arrears?

Yes

No

- If yes, please provide details:

--

Is the property currently insured by the SSAS and when is the policy renewal date? Please enclose a copy of the policy schedule and the current certificate of insurance.

Yes

No

Policy renewal date

--

Policy schedule & certificate of insurance enclosed

Please provide the full name of the original vendor/seller of the property to the SSAS.

--

- Is the vendor/seller a connected party?

Yes

No

Actual date (or approximate date) when the property was acquired by the SSAS

--

The original purchase price

£

--

Does the property have any current planning permissions – e.g. building works or a change of use?

Yes

No

- If yes, please provide details and enclose copies of relevant documentation

--

### 3 Existing Scheme Borrowing

Does the SSAS currently have any outstanding borrowings?

Yes

No

- If yes, please provide details of each separate loan and enclose copies of the most recent loan account statements

Loan account statements enclosed

Are the existing borrowings secured over this property?

Yes

No

n/a

Original sum borrowed

£

Date the original loan was made

Current balance of the loan

£

Final repayment date of the loan

**Lender's details:**

Name

Address

Telephone number

Email

Postcode	

## 4 Existing Lease Details

---

**Please skip this section if the property/land is unoccupied.**

Name of current tenant

Is the tenant a connected party?

Rental commencement date under the Lease

Current level of rent

Frequency of rental payments (in advance)

Next rent review date

Lease expiry date

Does the tenant have security of tenure re 1954 Landlord &amp; Tenant Act?

Is the tenant VAT registered?

Is the tenant exempt for VAT purposes?

Yes	No	
£		
Monthly	Quarterly	Other
If other, please confirm frequency:		
Yes	No	
Yes	No	
Yes	No	

## 5 SSAS Trustees' Solicitor's Details

---

**For re-registration with HM Land Registry and with any Lender.**

Contact name

Name of firm

Address

Telephone number

Email

Postcode	

## 6 SSAS Trustees' Surveyors Details

---

### Chartered surveyor acting for the SSAS trustees:

Contact name

Name of firm

Address

Postcode

Telephone number

Email

## 7 Property Management

---

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

Yes

No

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

Contact name

Name of firm

Address

Postcode

Telephone number

Email

**If the member trustees do not wish to appoint a third-party property manager then all of the member trustees are jointly responsible for managing the property/land.**

## 8 Property Insurance

---

**Please provide full details of the insurance broker or the insurance company (if the pension scheme's property insurance cover is taken out directly with the insurer):**

Contact name

Name of firm

Address

Postcode

Telephone number

Email

## 9 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/our knowledge.
- Morhart Pension Services Ltd ('Morhart') is authorised to discuss this property with any or all third parties which are listed within this questionnaire.
- Morhart and associated companies have given no advice in relation to the suitability of this property and that their liability shall be limited to the value of the assets of the SSAS.
- I/We understand the risks associated with this type of investment and acknowledge the illiquid nature of a property investment.
- I/We accept full liability for any tax charges or penalties which are imposed by HMRC as a result of this investment.
- I/We believe that this is an acceptable pension scheme investment and will continue to monitor this investment to ensure that it will not lead to tax charges.
- I/We confirm that we have obtained adequate insurance for the property and will provide Morhart with a copy of the relevant policy document.
- I/We confirm that if a third-party property manager is not appointed then the member trustee(s) is/are responsible for all ongoing property management.
- I/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

--