

Premier SSAS Lease Questionnaire & Declaration

Please complete this form in full. Incomplete or missing information may cause delays in the setting up of the lease.

1. Pension scheme information

Pension Scheme Name:

Pension Scheme Reference:

2. Property information

Full property address including post code:

Property HM Land Registry title number:

Telephone:

Pension scheme's interest:

Is there a current Energy Performance Certificate (EPC)?

EPC rating: EPC expiry date:

Note: If an EPC has not been obtained then you will need to arrange for one to be produced. If you have not already provided an EPC, we will need a copy. Please refer to our covering communication for further information on this.

3. Tenant information

Is the tenant a connected party?

Is this an existing or new tenant?

If an existing tenant, are there any rent arrears?

If yes, please provide details:

Entity of tenant (i.e., limited company, sole trader, LLP etc):

Name of tenant:

Company number:

Registered address:

Correspondence address:

3. Tenant information (continued)

Residential address:
(sole traders only)

Telephone number: Email address:

Tenant's main business:

Have you verified the credit worthiness of the tenant?

4. Lease information

Please confirm details of the key terms agreed:

Term : Rent amount p.a. £

Rental frequency:

Rent Free Period?

Rental review?

Rent Deposit? *(any rental deposit cannot be held within the scheme)*

VAT payable?

Option to buy?

Break clause?

Is there a guarantor?

Sub-letting with the Landlord's consent?

Authorised usage:

If you have answered Yes to any of the questions above, please provide full details below:

If there are any bespoke covenants being proposed, please provide details below:

Is the lease to be excluded from the renewal provisions of the Landlord and Tenant Act 1954, meaning that that the tenant will have no statutory right of renewal?

Note: If you are unsure, the solicitor will be able to advise. Please note that we will normally insist on this exclusion should any sub-leases be subsequently agreed.

Are there any sub-leases in place?

If Yes, please provide full details below.

If VAT is payable, do you require us to issue VAT Rental Invoices directly to the tenant?

Note: If not, we must be copied in on the same day that they are issued to the tenant.

5. Solicitor information

Name of firm:

Name of solicitor acting:

Correspondence address

Telephone number: Email address:

6. Member Trustee(s) Declaration

I/We the undersigned hereby declare that:

1. All relevant information has been provided and is true to the best of my/our knowledge.
2. I/we understand that I am/we are fully responsible for ALL disbursements, legal fees, valuation fees and any other fees incurred in this matter even if the transaction is not completed, irrespective of the reason, and that these fees must be met from existing pension scheme funds.
3. I/we accept that should we choose not to appoint DJM Law on behalf of the pension scheme, that this may cause delays during the transaction due to standard agreed processes not being in place.
4. I/we accept that Options SSAS Limited ("Options UK") reserves the right to seek alternate legal advice should it be deemed necessary and that any costs relating to this will be payable by the pension scheme.
5. I/we accept that Options UK reserve the right to charge for any additional work needed as a result of not using DJM Law.
6. Should at any time the property become vacant, I/we will notify both Options UK and the relevant insurer, ensuring that all conditions set by the insurer are complied with in full.
7. When acting on an 'Execution Only' basis, I/we will not hold Options UK liable for any losses resulting from my/our acting without financial/VAT advice.
8. I/We acknowledge that Options UK are not VAT experts and will act under my /our instructions on an execution only basis.
9. I/We will always ensure compliance with the requirements of the Minimum Energy Efficiency Standard.
10. I/We accept that Options UK are not property managers, and that this responsibility falls to us unless a property management firm is appointed by us.
11. I/We fully indemnify Options UK from any liabilities arising because of its entering into a lease agreement on behalf of the pension scheme.

All Member Trustees must sign.

Member Trustee name: <input type="text"/>	Member Trustee Signature: <input type="text"/>	<input type="text"/>
Member Trustee name: <input type="text"/>	Member Trustee Signature: <input type="text"/>	
Member Trustee name: <input type="text"/>	Member Trustee Signature: <input type="text"/>	
Member Trustee name: <input type="text"/>	Member Trustee Signature: <input type="text"/>	

Date: Day Month Year



FOR MORE INFORMATION PLEASE CONTACT

OPTIONS SSAS LIMITED
 2nd Floor, Fitzalan House,
 Fitzalan Court,
 Fitzalan Place,
 Cardiff, CF24 0EL
 optionspensions.co.uk
 optionspremierssas@optionspensions.co.uk

Options UK Personal Pensions LLP, company no. OC345142, Options Corporate Pensions UK Limited, company no. 09358998, Options EBC Limited, company no 12484808 and Options SSAS Limited, company number 01230550. Options UK Personal Pensions LLP is authorised and regulated by the Financial Conduct Authority, FRN 501747. Options Corporate Pensions UK Ltd is regulated by The Pensions Regulator. All Options UK companies are registered in England and Wales: 1st Floor Lakeside House, Shirwell Crescent, Furzton Lake, Milton Keynes, Buckinghamshire, MK4 1GA.