

# Small Self Administered Pension Scheme Property Investment Questionnaire



Wealth Options  
Trustees Limited

As the sole member and beneficiary directing the investment of your Small Self Administered Pension Scheme, you should be aware that certain investment restrictions apply to your scheme in relation to the acquisition of property.

Please complete the Questionnaire below in order that Wealth Options Trustees Ltd, as the Pensioner Trustee of your scheme, can determine whether the property in question can be acquired by your scheme to hold as an investment.

Scheme Name:

Employer:

Member Trustee:

## Property to be acquired

Residential  Commercial  Holiday  Other

Address of property:

Current use of the property:

Is the property currently let:  Yes  No

## Details of the vendor of the property

Name of the Vendor:

Is the Vendor at arm's length to you/ your employer and associated companies?  Yes  No

Have you or anyone connected with you previously owned this property?  Yes  No

If Yes, please give more details:

Is the Vendor connected with you?  Yes  No

*(Please see overleaf for an explanation of the persons who are 'connected with' you, for this purpose)*

## Proposed use of the property

Do you, or anyone connected with you, intend to use the property as a residence or holiday home?  Yes  No

Do you, or anyone connected with you, intend to use the property in the course of a business in which you or anyone connected with you is involved?  Yes  No

Will the property be let or used by your employer, its directors, or an associated company, in the course of a business?  Yes  No

Is it proposed to sell on, or develop and then sell on, the property within a short period after acquisition?  Yes  No

## Finance

Acquisition cost, including costs, of the property:

Will the acquisition be financed partly by a loan?  Yes  No (If Yes, please give details of the proposed loan)

Loan amount:   Interest Only  Capital & Interest

Loan term:  years Lender:

Security required by lender for loan:

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## Declaration

I declare that the answers provided in this Questionnaire are correct and complete to the best of my knowledge. I understand and accept that if the proposed property investment above does not comply with Revenue and tax legislation requirements, Wealth Options Trustees Ltd, as Pensioner Trustee of my scheme, can not consent to the proposed acquisition of that property.

**Signature Required**

(Signed)  \_\_\_\_\_

Date:

<sup>1</sup>Please see investment restrictions for an explanation of the persons who are 'connected with' you

## Data Protection Acts

The information that you have provided will be treated as confidential and retained by Wealth Options Trustees Ltd for the purposes of financial services or as required by law. You have a right to request a copy of the information we hold about you for which we may charge a small fee to have any inaccuracies in your information corrected.