

# SIPP Property Investment Form

Please ensure that you have read and fully understood our Property Investment Booklet before completing this form.

Please complete the form as fully as possible. Should you have any queries, please contact us. Failure to provide relevant information will delay the transaction. Please use the back page of this form if you need to provide any additional details of the property investment.

Once completed, please return this form to: **DP Pensions Ltd** at Bridewell House, Bridewell Lane, Tenterden, Kent TN30 6FA Tel: 01580 762 555 Fax: 01580 766 444

**Please contact us if you would like this document in an alternative format.**

## 1. BASIC INFORMATION

**Name(s) of purchaser(s)**

Please include all names if a joint purchase

**Scheme Name**

**Scheme Account Number**

**Property Address**

Postcode

## 2. YOUR DETAILS

**Title** (circle or insert as appropriate)

Mr      Mrs      Ms      Miss      Other:

**Forename(s)**

**Surname**

**Email address**

**Permanent Residential Address**

Postcode

**Daytime Phone Number**

**Mobile Number**

If more than one purchaser please supply their details on the last page of this form, where you can add additional information.

**3. FINANCIAL ADVISER DETAILS**

Please complete this section if you have a financial adviser

Contact Name	<input type="text"/>		
Company/Firm Name	<input type="text"/>		
Phone Number	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>
Email Address	<input type="text"/>		

**4. SOLICITOR'S DETAILS**

If you don't have a solicitor and would like us to provide a list of solicitors we have previously dealt with, please tick this box

If you do have a solicitor, please provide their details below.

Contact Name	<input type="text"/>		
Company/Firm Name	<input type="text"/>		
Phone Number	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>
Email Address	<input type="text"/>		

**5. THE SELLER**

Seller's Name	<input type="text"/>		
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Is the seller a 'connected party'? Yes  No

Please refer to our Property Investment Booklet for details

If yes, please give details of the connection	<input type="text"/>		
	<input type="text"/>		
Seller's solicitor's name and contact details	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>	Phone Number	<input type="text"/>

**6. SURVEYOR'S DETAILS**

If either the seller or tenant of a new lease are connected parties, then a surveyor will be required.

Contact Name	<input type="text"/>		
Company/Firm Name	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>		
Postcode	<input type="text"/>	Phone Number	<input type="text"/>
Email Address	<input type="text"/>		

**7. THE PROPERTY**

Property Address (including postcode)	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>	Postcode	<input type="text"/>
Land Registry Title Number	<input type="text"/> (If known)		
Please indicate whether the property is:	<input type="checkbox"/> Freehold	or	<input type="checkbox"/> Leasehold
If the property is leasehold, is a new lease being granted or is the SIPP buying an existing one?	<input type="text"/>		
If property is leasehold, what is the remaining term?	<input type="text"/>		
If property is leasehold, what is the annual ground rent?	<input type="text"/>		
Purchase Price excluding VAT	£ <input type="text"/>		
VAT on purchase price if applicable	£ <input type="text"/>		
Property Description (e.g. land/offices/warehouse etc)	<input type="text"/>		
	<input type="text"/>		
Approximate age of property	<input type="text"/>		
Is there any residential element?	Yes <input type="checkbox"/>		No <input type="checkbox"/>
If yes, please give details	<input type="text"/>		
Please note the occupant must have a job requiring them to occupy the site. Please give full details and NOTE: we will not permit any connected party to occupy a residential element.	<input type="text"/>		

Please send the Land Registry Plan with the property clearly marked with this form

**8. TIMEFRAME**

Proposed date of exchange / completion  /  /

Any other timing factors

**9. VAT**

Is the property currently opted to tax (VAT registered)? Yes  No

If yes, and there is an existing lease, is the purchase a transfer of a going concern? Yes  No

If not currently opted to tax, do you plan to opt to tax on purchase? Yes  No

Has professional advice on VAT been sought? Yes  No

If yes, please provide full details of adviser

**10. PROPERTY DEVELOPMENT**

Do you plan to develop the property once your SIPP has purchased it? Yes  No

If yes, please read our separate Property Information - Building Works Guide and complete the corresponding Form. This is in order to obtain some further details from you regarding the planned development.

**11. FUNDING THE PURCHASE**

**Estimated cost of purchase** - please use this section to estimate how much the purchase will cost

Purchase price	£ <input type="text"/>
VAT if appropriate	£ <input type="text"/>
Development / fit out costs	£ <input type="text"/>
Estimated Stamp Duty	£ <input type="text"/>
Estimated costs of professionals and disbursements	£ <input type="text"/>
Estimated total cost of purchase	£ <input type="text"/>

**Source of funds** - please detail below how you intend to meet the total cost of purchase

Cash held in SIPP bank accounts	£
SIPP assets to be sold	£
Contributions to your SIPP	£
Transfers to your SIPP from other pension schemes	£
Borrowing	£
Other (please specify)	£
Estimated total funds available	£

If more than one purchaser please supply their funding details on the last page of this form, where you can add additional information.

**12. BORROWING**

Please complete this section in full if your SIPP will be borrowing to fund the purchase, or if the property is being transferred in from another pension scheme subject to existing borrowing.

Will your SIPP be borrowing funds to help fund the purchase? Yes  No

Lender's Name

Contact Name

Lender's Address

Postcode  Phone Number

Lender's email

Is the lender a 'connected party'? Yes  No

Please refer to our Property Investment Booklet for details

If lender is connected, then confirmation of commercial terms is required. Please supply this or confirm that we can obtain it on your behalf

**12. BORROWING continued**

Amount of loan	£
Term of loan	
Interest rate	
Repayment amount	£
Repayment frequency (e.g. monthly)	

**13. STATUTORY REQUIREMENTS**

Do you have a copy of the energy performance certificate for the property? Yes  No

If yes, please provide us with a copy. Is a copy enclosed? Yes  No

Do you have an environmental search report for the property? Yes  No

If yes, please provide us with a copy. Is a copy enclosed? Yes  No

If no, then we will arrange for one to be carried out. Is a land registry or other detailed location plan enclosed? Yes  No

Are you aware of any environmental or flooding issues? Yes  No

If yes, please provide us with details.

Is there an asbestos survey and report for the property? Yes  No

If yes, please provide us with a copy.

Is there a fire safety report for the property? Yes  No

If yes, please provide us with a copy.

**14. JOINT PURCHASES**

If the property is being purchased by more parties than just your SIPP, please provide details below:

Name of party	Percentage ownership
Please indicate who is to be the main point of contact	

**If one of the owners is a limited company, please provide the following:**

Full company name

Company Registration No

Registered Address

Postcode  Phone Number

**15. LEASES AND OCCUPATION OF THE PROPERTY**

Is the property being purchased subject to an existing lease to someone in occupation of the property? Yes  No

If no, is a new lease being granted? Yes  No

How many leases of the property will there be?

**Please provide the following information for all leases (existing and new)**

Copy this page for additional leases and provide a plan showing which parts of the property are let.

Tenant's Name

Contact Name

Tenant's Address

Postcode  Phone Number

Tenant's email

Is the tenant a 'connected party'? Yes  No

Please refer to our Property Investment Booklet for details

If yes, please give details of the connection

Rent amount per annum £  (+ VAT on rent per annum £ )

Rent Frequency  Monthly  Quarterly  Other:  Advance/Arrears

Frequency of rent reviews

Is there a rent deposit? Yes  No

If yes, how much?

Lease start date

Lease term

Any rent free period? Yes  No

If yes, how long?

Are service charges rechargeable to the tenant? Yes  No

Are insurance premiums rechargeable to the tenant? Yes  No

Is there a guarantor? If yes, please provide details Yes  No

Any other relevant details?

## 16. PROPERTY INSURANCE

Lockton Insurance Quotation Form attached? Yes  No

We have specific insurance requirements that must be met so do let us know if you intend to use your own insurer.

## 17. MANAGING THE PROPERTY

Will you appoint a managing agent to manage the property? Yes  No

If no, then you will manage the property yourself. Please read your responsibilities in the Property Investment Booklet. If yes, then please give the details below:

Company Name	<input type="text"/>		
Contact Name	<input type="text"/>		
Address	<input type="text"/>		
	<input type="text"/>		
Postcode	<input type="text"/>	Phone Number	<input type="text"/>
Email	<input type="text"/>		

## 18. AGREEMENT AND DECLARATION

1. I request the acquisition of the property outlined in this form as an investment of my/our pension scheme.
2. I declare that to the best of my knowledge and belief, the particulars given in this Property Investment Form and any other documents completed in connection with this purchase are complete and correct. I will notify DP Pensions Ltd immediately should any of the information change, or I discover that any of the information given is incorrect. I acknowledge that by providing inaccurate or incomplete information in this Property Investment Form I may cause delay to the transaction and may incur additional costs or tax charges at a cost to my pension scheme or myself personally.
3. I note that I am bound by the provisions of the DP Pensions Ltd Property Investment Booklet and the Key Features and Terms & Conditions of my SIPP. I confirm that I have read and understood the Guide.
4. If the property purchase for whatever reason does not proceed and if there are no monies available in my pension fund, then I acknowledge that any fees or costs incurred in this transaction will be met by me personally.
5. Where this is a joint purchase, we confirm that:
  - a. DP Pensions Ltd is authorised to send information relating to the property and communicate with all joint owners, even though doing so may disclose directly or indirectly information relating to any other joint owner.
  - b. We agree to DP Pensions Ltd carrying out checks to establish proof of my/our identity and residence. Should these checks prove unsatisfactory, I will be required to provide proof of my identity to the satisfaction of DP Pensions Ltd.
6. I confirm that by signing the Property Investment Form I agree that I will correspond with DP Pensions Ltd and D A Phillips & Co Ltd in future regarding all matters connected with the purchase and ongoing management of the property. Neither DP Pensions Ltd nor D A Phillips & Co Ltd will be



liable for any charges/losses associated with my failure to correspond with them regarding this, or my failure to adhere to the terms of any lease or lease renewal requirements.

- 7. I have appointed a solicitor to deal with the purchase. The cost of this professional advice will be borne by my pension scheme.
- 8. I have received no advice from DP Pensions Ltd or D A Phillips & Co Ltd or any of either company's employees regarding this purchase.
- 9. If an independent valuation is required I understand that there could be costs attached to obtaining this and these costs will be borne by my pension scheme.
- 10. Should HMRC challenge a valuation, I understand that any possible resulting tax or other charge will be borne by my pension scheme and/or me or my business.
- 11. I confirm that if I choose to arrange my own insurance in respect of the property, I indemnify and keep indemnified DP Pensions Ltd and D A Phillips & Co Ltd against all actions, proceedings, claims, demands, costs, charges and or expenses which may occur as a result in the event that the insurance cover is not sufficient to meet any claim, or does not meet the Landlord's responsibilities under any Lease to which D A Phillips & Co Ltd is a party.
- 12. If I have opted to manage the property myself I confirm that I am responsible for managing the property at all times. I understand that if I fail to manage the property adequately myself, DP Pensions Ltd and D A Phillips & Co Ltd reserve the right to appoint a managing agent and the costs will be borne by my pension scheme.
- 13. By managing the property myself I confirm that I am responsible for meeting **all** regulatory and legal requirements in respect of the property. (This includes things such as (but not limited to) the following: management of asbestos, fire, gas, electricity and water safety etc).
- 14. I authorise DP Pensions Ltd to pay invoices incurred in obtaining environmental investigations satisfactory to them from my SIPP as a sole signatory.
- 15. I authorise DP Pensions Ltd to pay invoices incurred in obtaining insurance cover for the property satisfactory to them from my SIPP as a sole signatory.
- 16. I authorise DP Pensions Ltd to pay all other fees, invoices and charges incurred in association with this property investment from my SIPP as a sole signatory.

I understand it is a serious offence to make false statements – the penalties are severe and could lead to prosecution.

**All purchasers must sign below:**

Name	<input type="text"/>
Date	<input type="text"/>
Signature	<input type="text"/>
Name	<input type="text"/>
Date	<input type="text"/>
Signature	<input type="text"/>

# SIPP Property Investment Form



Name	<input type="text"/>
Date	<input type="text"/>
Signature	<input type="text"/>

Name	<input type="text"/>
Date	<input type="text"/>
Signature	<input type="text"/>

Name	<input type="text"/>
Date	<input type="text"/>
Signature	<input type="text"/>

Use this page to provide extra information or for additional parties to sign.

DP Pensions Ltd is registered in England at Bridewell House, Bridewell Lane, Tenterden, Kent TN30 6FA. Registered No. 4622475. DP Pensions Ltd is authorised and regulated by the Financial Conduct Authority.

D A Phillips & Co Ltd is registered in England at Bridewell House, Bridewell Lane, Tenterden, Kent TN30 6FA. Registered No 2120249.

Phone: 01580 762 555

Fax: 01580 766 444

Email: [enquiries@dapco.co.uk](mailto:enquiries@dapco.co.uk)

Website: [www.dapco.co.uk](http://www.dapco.co.uk)

Our SIPPs are operated and administered by DP Pensions Ltd. The trustee of the schemes is D A Phillips & Co Ltd.

July 2023

# Commercial Buildings Quotation Form



**LOCKTON**<sup>®</sup>

UNCOMMONLY INDEPENDENT

## Proposed Policyholder(s)

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Please confirm the name(s) of the insured person(s) who will be named in the policy

Name(s) of the insured person(s)

Start date of policy

## Property Details

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Address of property to be insured

Postcode

Year of construction of the property

Year of conversion - if applicable

Type of property

Residential

Commercial

No. of storeys

No. of units/flats

Main tenant

If the premises are commercial, please confirm occupation/trade

Are the premises occupied

YES

NO

**If the property is industrial in nature:**

What processes are undertaken at the site

What machinery is involved in these processes

What hot works are undertaken

What waste is generated and how is this stored

If the property is unoccupied, please complete the following:

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How long has the property been vacant

When will the property be re-let and what is the intended future use

What security is there on site

Alarm

CCTV

Sitex Orbis

Perimeter Fencing

How often is the property inspected

Have the facilities been turned off (water, gas etc.)

Have the windows & doors been boarded

Survey contact details

Are there any security measures that enhance the risk:

Construction details of the property

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Floors

Concrete

Timber

Steel

Other

Roof

Concrete

Pitched tile

Flat felt

Other

Wall/Frame

Brick/block cavity

Solid block or concrete

Concrete frame

Steel frame

Timber frame

Other

Percentage of flat roof

Are the communal areas sprinklered

YES

NO

UNKNOWN

Is there any cladding or panels on the building

YES

NO

UNKNOWN

Are the panels LPC approved

YES

NO

UNKNOWN

Additional details in respect of the construction and materials used for the panels & insulation:

Additional construction details

## Details of cover required

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Building reinstatement value	£					
Contents of communal areas	£					
Service Charge	£					
Indemnity period		12	24	36	48	60
Loss of rent (annual)	£					
Indemnity period		12	24	36	48	60
Is terrorism insurance required?		YES		NO		

## Land only details required

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Size of Land	SqFt		
Are there any water courses	YES	NO	
If yes, please provide details	Depth		
	Size		
	Security in place		
	Warning Signs	YES	NO
Any history with trespassers	YES	NO	
Security on the land			
Any public right of way	YES	NO	
Any outbuildings or adverse features, if so, please provide construction details and values			

## Insurance/Claims

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To your knowledge has the property ever suffered from flood, subsidence, heave or landslip

YES

NO

If YES, please provide details

Are there any trees within ten metres of the property

YES

NO

If YES, please provide details

Please provide details of any claims or losses which have affected the property during the last 5 years

Name of the existing or previous insurer if known

Please confirm building insurance premium paid last year exc. IPT

£

Interest to be noted on the policy

## Insurance Disclosure

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Please note that it is your duty to disclose any information that might influence the insurers/ re-insurers in fixing the premium or determine whether to accept the risk. Please provide as much information as possible. If the information is unknown then please state unknown.

Other Information

Date: ..... / ..... / .....

Name (Print in BLOCK CAPITALS) .....