



# HERITAGE PENSIONS

## PROPERTY SALE QUESTIONNAIRE

Name of SSAS \_\_\_\_\_

**PLEASE RETURN THIS FORM TO:**

Heritage Pension Administration Limited  
6 Doolittle Mill  
Froghall Road  
Amphill  
Bedfordshire  
MK45 2ND

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# 1 Parties to the Transaction

## Member(s) and Trustee(s) details

Please complete the details below for additional Members/other parties on a photocopy of this page

Name	<input style="width: 100%;" type="text"/>	
	Same % share as the SSAS common fund; or % selling	<input style="width: 100px;" type="text"/> %
Name	<input style="width: 100%;" type="text"/>	
	Same % share as the SSAS common fund; or % selling	<input style="width: 100px;" type="text"/> %
Name	<input style="width: 100%;" type="text"/>	
	Same % share as the SSAS common fund; or % selling	<input style="width: 100px;" type="text"/> %
Other parties	<input style="width: 150px; height: 50px;" type="text"/>	selling <input style="width: 100px;" type="text"/> %
	<b>Total</b>	<input style="width: 100px; text-align: center; value: 100%;" type="text"/>

## Member(s) and Trustee(s) solicitor's details

Heritage has negotiated special rates with MacIntyre Law. Details of their fees and services are included in Section 6. We will instruct MacIntyre Law to act for the Trustees unless you prefer we instruct an alternative firm of solicitors.

### Please confirm

I would like Heritage to instruct MacIntyre Law Yes  No

*If No, I would like Heritage to instruct the following firm of solicitors*

Solicitor's name	<input style="width: 100%;" type="text"/>	
Solicitor's firm	<input style="width: 100%;" type="text"/>	
Address	<input style="width: 100%;" type="text"/>	
	<input style="width: 100%;" type="text"/>	
	<input style="width: 150px;" type="text"/>	Postcode <input style="width: 100px;" type="text"/>



Email address

Telephone numbers

Office

Mobile

**Purchaser's details**

Title

Mr

Mrs

Miss

Ms

Other

Name

Permanent residential address

Postcode

Email address

Telephone numbers

Home

Work

Mobile

Fax

Is the purchaser connected\*?

Yes

No

\* A connected party can be a spouse, family member or be connected by common directorship

**Note:** a valuation report carried out by a suitably qualified firm will be required if selling to a connected party**Valuer's details (if required)**

Valuer's name

Valuer's firm

Address

Postcode

Email address

Telephone numbers

Office

Mobile



**Purchaser's solicitor's details**

Solicitor's name

Solicitor's firm

Address

Postcode

Email address

Telephone numbers

Office

Mobile

## 2 Property Details

**General details**

Address

Postcode

## 3 Property Sale Price

The sale price is

£

(excluding VAT)

**VAT (if applicable)**

Will VAT be payable on the sale price?

Yes

No

Will the sale be treated as a Transfer of Going Concern (TOGC)?

Yes

No



## 4 Heritage Property Fees & Services

Sale of property	£605
Sale of land	£505
Sale of overseas property/land	<i>minimum £2,000 time cost thereafter</i> £2,000

VAT is payable on all fees

## 5 Member(s) and Trustee(s) Authorisation & Declaration

- a I/We hereby authorise Heritage Pension Administration Limited to sell the above property, which is an asset of my/our SSAS.
- b I/We understand that Heritage Pension Administration Limited will not be liable for any claim concerning the suitability of the property sale at this time.
- c I/We accept responsibility for all tax aspects (including VAT) of the transaction and/or any tax charges imposed by HM Revenue & Customs
- d I/We understand that any borrowing in respect of the property must be repaid upon completion of the sale.
- e I/We request that Heritage Pension Administration Limited appoints the parties detailed in this questionnaire.
- f I/We acknowledge that in the event of the sale not proceeding, for whatever reason, I/we will meet all of the costs incurred up to that point.
- g I/We declare that every statement made in this questionnaire is to the best of my/our knowledge and belief true and complete.

Signed by the  
Member(s) and Trustee(s)\*

Name

Dated

\* All Members and Trustees to sign



# 6 MacIntyre Law Fees & Services

**Property sale**

Property value up to £500,000	£912
Property value between £500,000 and £1m	£1,060
Property value between £1m and £2m	£1,560
Property value in excess of £2m	£1,976

*VAT is payable on all fees*

