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# HERITAGE PENSIONS

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## PROPERTY SALE QUESTIONNAIRE

**PLEASE RETURN THIS FORM TO:**

Heritage Pensions 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 type="text"/>		
SIPP Reference	<input type="text"/>	sale	<input type="text"/> %
Name	<input type="text"/>		
SIPP Reference	<input type="text"/>	sale	<input type="text"/> %
Name	<input type="text"/>		
SIPP Reference	<input type="text"/>	sale	<input type="text"/> %
Other parties	<input type="text"/>	sale	<input type="text"/> %
			<b>Total</b> <input type="text" value="100%"/>

## 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 type="text"/>	
Solicitor's firm	<input type="text"/>	
Address	<input type="text"/>	
	<input type="text"/>	
	Postcode	<input 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	£600
Sale of land	£500
Sale of oversease property/land	<i>minimum £2,000 time cost thereafter</i> £2,000

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

- a I/We hereby authorise Heritage Pensions Limited to sell the above property, which is an asset of my/our SIPP.
- b I/We understand that Heritage Pensions 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 Pensions 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*

