



IPM PERSONAL PENSION SCHEME

If you have a vulnerability or need specific support during the life of your SIPP, please let us know. You do not need to tell us what it is, just how we can help to make things easier.

1 INFORMATION

Please ensure that all questions on this questionnaire are answered in full. Once we receive the fully completed questionnaire we will then instruct our solicitors to act on our behalf in the sale; they in turn will contact the buyer's solicitor with the aim of agreeing all appropriate documentation.

Please note that in all cases:

1. Where the buyer is a connected party, you must obtain and provide us with a professional open market valuation supporting the sale price. A connected party constitutes any close family member, business partner or fellow company director. If you are unsure whether your relationship with the seller constitutes a "connection", please call this office to clarify.
2. All documentation relating to the sale, will include a clause limiting the liability of IPM to the value of the assets of the arrangements for you in the IPM Personal Pension Scheme;
3. An EPC (Energy Performance Certificate) must be presented to the buyer prior to completion of the sale
4. Full Replies to CPSE forms may be required.

Address of Property

 Postcode

2 QUESTIONNAIRE

1. Full name(s) of member(s) and membership number(s)

Members Name(s)

Membership Number(s)

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2. Are you happy for IPM to instruct a panel solicitor to act on the sale?

Yes

No

3. If you wish to appoint your own solicitor, please provide the details below:

Name of Individual Solicitor

Firm Name

Address

Tel No.

Postcode

4. Full name(s) of the buyer(s)

Buyer 1

Buyer 2

5. Buyer's address i.e. home address if individuals, or registered office address if a company

Name

Address

Postcode

6. Registered number (if a company)

Registered Number

7. Name, address and reference of buyer's solicitors

Name

Address

Postcode

8. Is the buyer a connected party? Yes

No

9. If connected, has an open market valuation been obtained to set the sale price?

Yes

No

If so please forward a copy of the valuation to this office, if not please contact a local chartered surveyor to commission a report and arrange for it to be forwarded to this office. We will not proceed with a sale to a connected party, until the valuation is received.

10. Sale Price £

11. Is the property to be sold with vacant possession or subject to an occupational lease?

Vacant Possession Occupational Lease

12. If you are connected to the current tenant and the lease is to be surrendered on completion of the sale, please forward the original lease

13. Are the whole of the premises to be sold? Yes No

14. If not, provide both an accurate description of the part to be sold and a plan

15. Has an EPC (Energy Performance Certificate) been produced? Yes No

If so please forward a copy to this office; alternatively please contact a local agent to commission the certificate. It is a criminal offence to complete a sale, without presenting the buyer with an EPC and this obligation cannot be waived by the buyer.

16. Have any special terms been agreed? If so, please provide details. Yes No

17. If this is the only VAT elected property which your SIPP owns, should we contact HMRC following completion of the sale to cancel the VAT registration? Yes No

Member's Name

Signature

I.P.M. SIPP Administration Limited is Authorised and Regulated by the Financial Conduct Authority



I.P.M. SIPP Administration Limited • Cambridge House, Unit B, Campus Six, Caxton Way, Stevenage, Hertfordshire, SG1 2XD
Tel: 01438 747 151 • Fax: 01438 357 344 • Email: info@ipm-pensions.co.uk • Web: www.ipm-pensions.co.uk