

SSAS property sale questionnaire

Important notes



- This form enables us to review a proposed property sale or transfer out.
- Please complete as fully as possible. **Incomplete information may lead to delays.**
- You should also refer to your **Member Trustee Guide** and the sale section of our **SSAS Commercial Property (including land) Guide**, copies of which can also be found on our website.

This document is updated regularly. Please ensure you’re referring to the latest document by visiting our website or contacting your Xafinity SSAS Consultant.

SSAS scheme details

SSAS scheme name	
Xafinity SSAS reference no	

Property sale details

(a) Please state the full address (including postcode) of the property or land. Please also provide the Title Number/Land Registry Reference, if known.	Address: Title Number/Land Registry Reference:
(b) Description of property type (e.g. commercial, industrial, offices).	
(c) Name of solicitor firm to be appointed to act on behalf of your SSAS. <i>If “Non-panel”, please insert address and phone number/email address of solicitor and complete the non-panel solicitor declaration section of the member’s resolution in this questionnaire.</i>	Firm: Solicitor: Address: Tel: Email:
(d) Name of purchaser and is the purchaser “connected” to the member(s)? <i>If the purchaser is “connected”, please provide a copy of an independently prepared property</i>	Name:

Lease termination details

Please complete this section if a lease is to be terminated

Please complete as fully as possible.

(a) Date tenant fully vacating / vacated the building	DD/MM/YYYY
(b) Is there a break clause in the existing lease?	Yes / No
(c) Is the tenant a connected party?	Yes / No
(d) Is a premium due for the early termination of the lease? <i>If a premium is due and the tenant is a connected party, a valuation will be required from a RICS qualified surveyor to confirm the level of premium due</i>	Yes / No
(e) Please provide full contact details of the solicitor that will be acting on behalf of the tenant and where relevant, any other interested party.	

Solicitor nomination & resolutions

Please complete in all cases

I/We the undersigned hereby declare:

- All relevant information has been provided.
- I/We understand that we are fully responsible for ALL disbursements, legal fees, valuation fees and any other fees incurred in this matter even if the transaction is not completed, irrespective of the reason, and that these fees must be met from existing SSAS funds. We hereby authorise Xafinity to meet any of these fees from the SSAS funds.
- I/We have read the SSAS – Commercial Property (including Land) Guide and that the information that we have provided is true to the best of our knowledge.
- I/We authorise Xafinity to instruct _____ Solicitors to carry out the legal work on behalf of the SSAS in the forthcoming property transaction. Where the above solicitor is not on the Xafinity panel, I/we confirm:
 1. That I/we understand that Xafinity's preferred solicitors are
 - 1.1 Bevirs in England and Wales;
 - 1.2 Harper Macleod, Anderson Strathern or Morton Fraser in Scotland; or
 - 1.3 Shean Dickson Merrick in Northern Ireland.
 2. On making this decision, I/we accept that this may cause delays during the transaction due to standard agreed processes that Xafinity have in place with their preferred solicitors not being in place with my/our chosen solicitor.
 3. I/we accept that Xafinity reserves the right to refer any legal matter that they feel the SSAS needs separate legal advice on to their preferred solicitors and that any costs relating to this will be payable by the SSAS.
 4. I/we accept Xafinity's belief that by not using their preferred solicitor that legal costs will be higher than they would be if their preferred solicitor was used.
 5. That I/we authorise Xafinity to instruct and deal with the solicitor shown in 2 above to carry out the legal work on behalf of the SSAS.
 6. I/we accept that Xafinity reserve the right to charge for any additional work that they need to carry out that is due to their preferred solicitors not being used
- In relation to an early termination of lease, I/we have corresponded with the tenant(s) and can confirm their exit date from the building and that they have provided the necessary notice in writing.

- I/we confirm I/we have received written investment advice (where required) from an appropriately qualified person and I/we will not hold Xafinity liable for any losses resulting from my/our investment decisions.

Please sign on the dotted line and print your name where indicated. **All Trustees must sign this resolution. Please copy and continue on a separate page where necessary.**

Trustee's signature	
Trustee's name	
Trustee's signature	
Trustee's name	
Trustee's signature	
Trustee's name	
Trustee's signature	
Trustee's name	
Trustee's signature	
Trustee's name	
Trustee's signature	
Trustee's name	
Date of signing	

Checklist

Have you included.....?

Please note any comments in the box on the right

	Please tick as appropriate			Comments
	Y	N	N/A	
Fully completed SSAS property sale questionnaire	<input type="checkbox"/>			
Independent survey / valuation / evidence of early termination premium (must be dated within 6 months of completion for connected party transaction)	<input type="checkbox"/>	<input type="checkbox"/>		
Copy of existing lease (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Fully completed solicitor appointment and resolutions	<input type="checkbox"/>			
Energy Performance Certificate (EPC) (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

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