



BARNETT  
WADDINGHAM  
beyond the expected

# Property Sale Questionnaire

Barnett Waddingham Self Invested Personal Pensions

## Guidance notes

Throughout this Questionnaire, words or phrases which are in ***bold italics*** are explained in the Glossary available on our website, which you should refer to when completing this.

Please complete this Form in full using BLOCK CAPITALS and black ink, and send the original, with all supporting documents, to: BW SIPP LLP, PO Box 1209, Cheltenham, Gloucestershire GL50 9WE.

## 1. Current Owner(s)

Member(s) name	Member(s) SIPP Number	%age of overall ownership

If the property is held jointly with any other third parties please complete their details below:

Name: .....

Address: .....

.....

..... Postcode: .....

Contact name and telephone number: .....

Email: .....

%age of overall ownership: .....

## 2. Property details

Property address: .....

.....

..... Postcode: .....

Agreed sale price: £ .....

Proposed completion date: .....

Reason for selling the property? .....

### 3. Solicitor

Please indicate which Barnett Waddingham panel solicitor you would like to use below:

Scottish Properties:  DWF  Morton Fraser  
English Properties:  Birketts  Charles Russell Speechlys  DWF

If you wish to use your own solicitor, please provide their contact details below:

Solicitor name: .....

Address: .....

.....

..... Postcode: .....

Contact name and telephone number: .....

Email: .....

### 4. Purchaser's details

Name of purchaser: .....

Address of purchaser: .....

.....

..... Postcode: .....

Purchaser's solicitor: .....

Address: .....

.....

..... Postcode: .....

Name: ..... Telephone number: .....

Email: .....

Is the purchaser a **connected party**?  Yes  No

If 'Yes', we will require a survey to be carried out by a RICS qualified surveyor. If the sale is unconnected this is not necessary. For definition of **connected party** please see the glossary on Barnett Waddingham's website, [www.barnett-waddingham.co.uk](http://www.barnett-waddingham.co.uk). Any valuations should be addressed to BW SIPP Trustees Limited.

## 5. Surveyor

Have you ordered a valuation of the property?  Yes  No  N/A

If so, please forward a copy of this with the completed application.

If not, please provide the contact details requested below:

Surveyor name: .....

Address: .....

.....

..... Postcode: .....

Email: .....

Contact details to provide to surveyor to arrange access to the property:

Name: .....

Telephone number: .....

Email: .....

## 6. Energy Performance Certificate (EPC)

Is there a valid EPC for the property being sold?  Yes  No  N/A

If there is, please enclose a copy with the completed form or, if this is stored on the online register, complete the Report Reference Number below; this is the 20-digit number that appears on the front page of the Energy Performance Certificate:

.....

If there is no EPC in place and the property being sold is not exempt from having to provide one would you like to use our panel provider, GreenRock Energy, to prepare this?

Yes  No  N/A

If not then please provide the details of who you have instructed to carry this out below:

Company name: .....

Estimated date of receipt: .....

## 7. If VAT registered, is the property being transferred as a TOGC?

Yes       No       N/A

## 8. Agreement and Declaration

Please note that we cannot proceed with the property sale or any work connected to the sale until this Declaration has been agreed and signed by all participating **SIPP members**.

1. I/we request the sale of the Property by my/our pension scheme.
2. Please instruct the solicitor detailed in section 3 of this form to act on behalf of my/our pension scheme(s).
3. I/we confirm that the solicitor's point of contact throughout this transaction is BWSIPP LLP, for and on behalf of BW SIPP Trustees Ltd.
4. I/we confirm that all documentation and information held by BW SIPP LLP in respect of personal details, my/our **SIPP** details, and property details, can be provided as necessary to my/our chosen solicitor.
5. I/we confirm that if **connected** with the purchaser, I/we will fully state this at the outset and subsequently ensure an independent market rate valuation is obtained, dated within 6 months of the completion date. I/we will adhere to the values stated in the valuation report and will ensure all **connected** transactions will be done on an **arm's length** basis.
6. I/we acknowledge that, in the event of the sale not proceeding for whatever reason, all costs incurred up to the point that BW SIPP LLP receives notification of the cancellation, will be met by me/us. Third party fees (e.g. solicitor) will be settled by the relevant **SIPP** fund(s), in proportion to all co-owners or if insufficient funds are held within that **SIPP**(s), I/we agree to meet them from personal funds outside of my/our **SIPP**(s) which I/we shall transfer to Barnett Waddingham immediately on request.
7. I/we declare that every statement made in this Questionnaire is to the best of my/our knowledge and belief true and complete.
8. Primary contact: .....  
(This contact will be the main point of contact for BW SIPP LLP for all matters in connection with this property sale and any ongoing administrative duties. BW SIPP LLP will accept instructions from this contact and will assume it is on behalf of all owners.)

To be signed by all participating **members** as agreement of the above (duplicate if necessary):

Signed: .....

Signed: .....

Print name: .....

Print name: .....

Date: .....

Date: .....

Signed: .....

Signed: .....

Print name: .....

Print name: .....

Date: .....

Date: .....



## 11. What to do next

Please return the original completed and signed Questionnaire to your usual Barnett Waddingham client manager, with all supporting documents, and keep a copy for yourself.

We can also begin work on your sale on receipt of a fully completed scanned copy so please forward this to us as soon as it is available. If you would like to discuss anything related to this Questionnaire, please contact your usual Barnett Waddingham client manager or:

 0344 443 0100

 [propertyteam@bwsipp.co.uk](mailto:propertyteam@bwsipp.co.uk)

If you would like to discuss anything relating to this property sale please contact your usual Barnett Waddingham client manager, or:

 0344 443 0100

 [propertyteam@bwsipp.co.uk](mailto:propertyteam@bwsipp.co.uk)

[www.barnett-waddingham.co.uk/sip](http://www.barnett-waddingham.co.uk/sip)

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