



Small Self Administered Scheme (SSAS)

PROPERTY LETTING FORM

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This form must be completed when a Lease is required for any property within a pension scheme administered by D P Administration Ltd. You must read the accompanying Letting Guidance Notes when completing this form. Please cross through any sections of the form that do not apply.

Pension Scheme Name	
PSTR Number, if known	

Please confirm your contact details and preferred mode of communication:

Full Name			
Email address			
Telephone number(s)			
Address			
		Postcode	
Preferred mode of communication			

If you have an IFA that we regularly correspond with on your behalf they will be copied in on correspondence regarding the Lease.

1. PROPERTY DETAILS

Please confirm the details of the property:

Property address:			
		Postcode	

Do you insure the property under our block insurance policy with Lockton Companies LLP?

Yes No

If **No**, please provide details of the insurer and provide a copy of the current certificate of insurance:

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2. LETTING ARRANGEMENTS

Please refer to the Letting Guidance Notes.

Is this a Lease:

Yes

No

Is this a Farm Business Tenancy:

Yes

No

Is this a Licence:

Yes

No

Is this a Tenancy at Will:

Yes

No

3. LETTING DETAILS

Why is a new Lease/Licence/Tenancy required (please refer to the Letting Guidance Notes):

Is this a Lease of the whole of the property?

Yes

No

If **No**, please give details of which part/s is/are to be let and provide a plan of the property to be let, if possible?

Please provide some basic details about the letting arrangements (see Letting Guidance Notes for more information). If there are multiple Leases or the property is only part let we will also require clarification as to the percentage of insurance and service charges to be recharged to the tenant

Annual rent?

When rent is to be paid? (E.g. monthly / quarterly)

When are the Rent Reviews to take place? (E.g. every 3 years)

Is there provision for Rent Deposit and if yes how much?

When will the Lease start?

How long the Lease will run for (years)?

Does the Lease exclude Part II of the Landlord and Tenant Act 1954 (LTA)?

Any rent free period, if yes, how long?

Are service charges rechargeable to the tenant?

Are insurance premiums rechargeable to the tenant?

Is there a Guarantor, if yes, provide details

Any other relevant details

4. OCCUPANT DETAILS

Is the existing tenant remaining in occupation?

Yes

No

N/A

If there is to be a new tenant, please confirm the details of the **new** tenant below:

Tenant's Name

Contact Name (if Company)

Company registration number

Address (if different from the property address)

Postcode

Is the existing or new tenant a person or company connected to you? (as defined in section 993-995 Income Tax Act 2007) (see Guidance Notes)

Yes

No

If the tenant is a connected party, an independent valuation confirming the market rent will be required (See Guidance Notes).

Please provide a description of what the tenant's will be using the premises for – what is their business?

What is the main occupation? (e.g. Shop, Garage, Café etc)

What trade processes are included, if applicable?

Are there any heat works, e.g. welding etc?

Other useful information regarding use:

If an independent valuation is required, please confirm the details of the surveyor:

Company Name	<input type="text"/>
Contact Name	<input type="text"/>
Email	<input type="text"/>
Telephone	<input type="text"/>

5. SOLICITORS DETAILS

Please confirm the details of the solicitor dealing with the transaction on your behalf

Company Name	<input type="text"/>
Contact Name	<input type="text"/>
Email	<input type="text"/>
Telephone	<input type="text"/>

6. MANAGEMENT OF THE PROPERTY

Who will be responsible for the management of the property?

The property will be self- managed. I will be taking on the responsibility of managing the property myself:

Yes No

The property will be managed by an appointed managing agent:

Yes No

If yes, please confirm the details of the Managing Agents to be appointed or already dealing with the property on your behalf, if applicable:

Company Name	<input type="text"/>
Contact Name	<input type="text"/>
Email	<input type="text"/>
Telephone	<input type="text"/>

7. DECLARATION

I confirm and agree the following:

1. I have instructed a solicitor to deal with the preparation of this letting arrangement. The costs of this professional advice will be borne by the pension scheme unless it has been agreed with the tenant that they will meet these costs.
2. I have received no advice from D P Administration Ltd or D A Phillips & Co Limited or any of either company's employees regarding this letting arrangement.
3. If an independent valuation is required I understand that there could be costs attached to obtaining this and these costs will be borne by the pension scheme.

4. Should HMRC challenge an independent valuation obtained I understand that any resulting tax consequence will be borne by the me and / or the pension scheme.
5. Should any information in this form change I will notify DP Pensions Limited immediately and if I fail to do so, I understand that any resulting tax consequences losses or charges will be borne by me / the pension scheme.
6. If I have opted to self – manage the property I confirm that I am responsible for managing the property at all times which includes dealing with any matters that arise in respect of the Lease. In particular the requirements set out in detail in the Property Letting Guide ‘What happens once the Lease is in place?’. I understand that if I fail to manage the property adequately myself, D P Administration Ltd reserve the right to instruct a managing agent and the costs of this will be borne by the pension scheme.
7. I have read, understood and agree the Property Letting Guidance Notes that accompany this form.
8. I declare that the information provided in this form, and any other documents completed in connection with it is, to the best of my knowledge and belief, correct and complete.
9. I understand it is a serious offence to make false statements; the penalties are severe and could lead to prosecution.

Trustee Signature	
Trustee Name	
Date	
Trustee Signature	
Trustee Name	
Date	
Trustee Signature	
Trustee Name	
Date	
Trustee Signature	
Trustee Name	
Date	

Please return your completed form to:

D A Phillips & Co Ltd
Bridewell House
Bridewell Lane
Tenterden
Kent TN30 6FA

Tel 01580 762 555
Fax 01580 766 444
enquiries@dapco.co.uk

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