



ALLTRUST[®]
A UAP Group Company

COMMERCIAL PROPERTY Questionnaire

May 2026

Introduction

Please complete this form in BLOCK CAPITALS and black ink and return it to: Alltrust property team, Alltrust Services Limited, Warner House, 123 Castle Street, Salisbury, SP1 3TB. If you need assistance in completing this form, please call our Property Purchase team on 01722 770484 or email us at property@alltrust.co.uk

All sections of this form must be fully completed before we will commence work on the purchase/transfer.

Permitted property



Retail shop (Single or Multi-tenant)



Restaurant



Hot food takeaway



Storage or distribution



Leisure



General industrial



Retail shop (Multi-tenant)



Cafe



Office (Single tenant)



Hotel purposes



Land for commercial



Special Industrial



Retail financial services



Drinking establishment



Office (Multi-tenant)



Non-residential institution



Agricultural land



Woodland may be considered permitted property in certain circumstances - please get in touch with our team to discuss further

A minimum of £500.00 must be available in the pension bank account prior to instructing the solicitors. This will be paid on account to the solicitor to cover initial searches and disbursements.

Please note: Alltrust will review all property purchases on a case-by-case basis. We reserve the right to refuse purchases and/or any proposed developments of property if we believe that the purchase or development may give rise to a tax charge or there are unacceptable levels of potential risk such as contamination.

Non-permitted property

- Taxable property including residential (dwelling houses), holiday apartments, beach huts and caravans.
- Residential institutions.
- Secure residential institutions.
- Property that benefits from an aggregated income such as hotel rooms and storage pods.
- Types of property where we are advised that there is no re-sale market, or we foresee real management difficulties
- Any property where insurance is unavailable or inadequate in the insurance market for any reason e.g. combustible composite panels, waste transfer and recycling sites, historic flooding, subsidence.
- Properties with known unremediated environmental issues.
- Land purchased from a third party that adjoins a member's personal residence where the member or connected party may gain a non-relevant benefit e.g. being purchased to preserve a view from their house or to stop someone else building or to increase the value of their personal residence.
- Properties at auction.
- Properties with existing tenants with known historic rent arrears or other material breaches.
- Freehold properties where part of the building comprises long leasehold residential properties even if let to third parties with nominal ground rent.
- Land for residential development, garden land, etc.
- Certain other residential institutions e.g. student accommodation and care homes etc.

Important note

Prior to completing this Questionnaire please ensure that you have received and read our Property Guide.

Block Insurance

The block insurers need the following information to ensure adequate cover upon completion:

Property Address

Postcode

Property Type/Description

Occupation/Trade Type

Tenant Name

Construction Details

Age of Building

Wall Construction

Floor Construction

Full Fire Separation between units?

Square Footage (if high risk trade)

Roof Construction

Flat Roof % (if applicable)

Panels	Yes	No
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Is the Property Listed?

Insured Values

Buildings Declared Value

Indemnity Period

Is the property VAT Opted?

When was the last Reinstatement Cost Assessment Carried out?

Other Considerations

Is Commercial Loss of Rent Required?

Confirm the annual loss rent figure

Engineering Inspection & Insurance

Is there any Statutory Plant you require an inspection policy for?

If lifts, how many floors do they service?

Claims

5 Years Claims History

Subsidence History

Flood History

Please note that unless we have approved an insurer we, as professional trustee*, will insure the property under our block policy for buildings reinstatement, loss of rent, terrorism and property owners liability upon completion of the transaction. Any existing insurance in these areas will have to be cancelled from the completion date. In order to avoid under insurance we reserve the right to instruct an independent insurance reinstatement cost assessment. The cost of the insurance premium will be deducted from your pension scheme account and you should arrange to recoup this cost from the occupational tenant under the terms of the Lease where it allows.

*Alltrust SIPP Limited

Purchaser Details

Is the property being purchased with other pension members? Yes No

All Pension Members

Pension Reference Number

Where there are multiple members, please nominate one to be our main contact in respect of this investment

Name of Main Contact

Will the main contact be appointed to be the property manager? Yes No

If 'No', please provide details of the property manager?Property Manager

Property Manager

Full Address

Postcode

Contact Name

Is the property being purchased or jointly owned with another party? Yes No

If 'Yes', please provide the following details

Name and Address

Share of Property (%)

Are the pension member(s) and the other parties above connected? Yes No

Property Details

Is the property being purchased with other pension members? Yes No

If 'Yes', % of property being purchased %

Property Address (in full)

Postcode

Land Registry Title

Is the property? Freehold Leasehold

Date the lease expires

Ground Rent Payable

Service Charge Payable

Type of property Offices Shop Hotel Industrial Units
Other

Proposed use of property

Do you have relevant planning permission for proposed use (if applicable) Yes No

Is there a residential element to the property? Yes No

If 'Yes', please provide full details below.

What is the purchase price / current value excluding VAT? (£)

Will the property be opted to tax? Yes No

Will the transaction be treated as a transfer of a going concern? Yes No

If yes, name of the nominated VAT representative:

Email address of the nominated VAT representative:

Funding Details

Will you borrow to assist with the purchase of the property? Yes No

If 'Yes', please provide Lender contact details in section 5.

Please provide details of how the purchase will be funded in the table below

Member Name	Percentage Ownership	Transfers	Cash	Contributions	Borrowing	Total

Property development

In addition to the purchase of the property, are other costs expected? Yes No

If 'Yes', what are the costs for? Development Redevelopment Refurbishment

What are the anticipated costs? (£)

Additional Information (for property development or the basis of the loan)

Tenant Details

Name of Tenant

Full Address

(if different to the property address)

Postcode

Company Registration Number

VAT Registration Number

Telephone Number

Email Address

Contact Name (if tenant is a company)

Is the tenant connected to the pension member(s)? Yes No

Is the tenant already occupying the property? Yes No

Funding Details (Continued)

If 'Yes', when does the lease expire?

Rent (pa)

If 'No', is the tenant moving in immediately following completion?

Yes No

Are there any rent arrears?

Yes No

Additional information (additional tenants, agreed rent free periods or deferred occupancy, full details of any rent arrears or issues)

Property Contacts

Solicitor

Butcher & Barlow

Trethowans

Birketts

Morton Fraser

Keystone Law

Other

If other, please specify

If you do not select a solicitor we will select a panel solicitor to act on behalf of the pension. Additional charges will apply for a non-panel solicitor.

Vendor Details

Name of Vendor

Full Address

(if different to the property address)

Postcode

Contact Name (if tenant is a company)

Is the Vendor connected to the pension member(s)?

Yes No

Vendor's Solicitors

Name

Full Address

Postcode

Contact Name

Telephone Number

Property Contacts (Continued)

Lender Details (if applicable)

Name of Bank/Lender

Full Address

Postcode

Contact Name

Email Address

Telephone Number

Fax Number

Member Declaration

I declare that to the best of my knowledge, the information provided in this application is true and complete. Alltrust will use this information to assess whether this property is allowed to be held within the pension. If the information provided proves to be false or incomplete and the property later transpires to be prohibited under the Scheme Rules, I hereby indemnify Alltrust and agree to be held personally liable to any and all penalties levied. I have received a copy of the Alltrust Commercial Property Guide and I have read and understood it.

I understand that you are not regulated by the FCA to provide investment advice. I understand that this responsibility and the checking of all decisions relating to the purchase and retention of pension investments lies with me and my appointed adviser(s).

I agree that a joint account should be opened where more than one pension Member is making the purchase. For any joint investment the rental income and proceeds on the sale will be split proportionately to each party's share of the property, which will reflect each party's contribution to the property. This will be documented in a Joint Ownership Agreement drafted by my solicitor and which will be executed prior to the property purchase.

I authorise the Trustees* to appoint a solicitor to act on behalf of the Trustees* in respect of the acquisition of the property and all professional costs will be met from the pension to include an initial sum of £500 to be paid on account of costs on instruction of the solicitor.

I agree to appoint a property manager which can be a pension Member or a professional company. The appointed party will be responsible for managing the property in accordance with the principles of good estate management which includes collecting rent on the Trustees* behalf and for arranging for the tenant to reimburse the cost of insurance.

I understand that the Trustees* will, unless alternate insurance has been provided and agreed, take out an insurance policy which will at least cover the replacement value of the building, 3 years' loss of rent, terrorism and property owners liability of £10 million, but that any other cover e.g. for contents will be the responsibility of the tenant. I authorise you to take the cost of the insurance from my funds, to be reimbursed as above. I understand that failure to reimburse may give rise to interest charges and could lead to unauthorised payment penalties. I understand that any insurance payout in respect of the property will be paid directly to the pension. I understand that in order to avoid under insurance Alltrust reserve the right to instruct an independent insurance reinstatement cost assessment and any cost will be met by from the pension.

I confirm that all correspondence relating to the property should be sent to the nominated contact until written notice is received to the contrary. I authorise you to provide such information as is required to progress the transaction to the solicitor, lender and valuer.

*Alltrust SIPP Limited

Declaration (Continued)

I have read, and agree to, the notes and guidance on property acquisitions:

Print Name

Signature

Date Signed

Print Name

Signature

Date Signed

Print Name

Signature

Date Signed

Print Name

Signature

Date Signed

Important Information

- Our limitation of liability clause must be entered into all legal documents, including any existing leases, without this we are unable to purchase any property or accept the transfer.
- We will require a satisfactory environmental search. Further investigation will be required if the report indicates potential contamination. We will be unable to proceed with the purchase if environmental searches are not satisfactory.
- Ensuring there is sufficient funding to purchase the property and pay all associated costs is the responsibility of the members and their financial advisers.
- All valuations must be dated within 6 months as at completion.
- We prefer that solicitors from our approved panel are used for property transactions. We will allow other solicitors to be used although additional charges will apply. Our panel solicitors are listed in Section 5.
- All properties will be insured on our block policy from completion. In exceptional circumstances we will consider alternative insurance providers, however these will be subject to our prior approval and additional charges

In addition to the information requested in this questionnaire, please send copies of the following documents with the questionnaire as this will avoid unnecessary delays, where appropriate.

- RICS qualified Independent Valuation (showing purchase, rental & Insurance Reinstatement Market Values) dated within the last 6 months
- Copy of Lease for existing tenant
- Energy Performance Certificate
- Copy of the Head Lease if property is to be purchased as a leasehold
- Asbestos Report
- Option to Tax Notice from Vendor
- Anti-Money Laundering Documents for the Tenants

Additional notes and important information

Alltrust requires members to obtain regulated financial advice for certain pension transactions, including but not limited to benefit crystallisation, the transfer of pensions into or out of your Alltrust pension, and the transfer or purchase of non-standard investments, unless the member has been formally assessed and accepted as a Knowledgeable Investor by Alltrust.

Where advice is required, it must be provided by a suitably qualified and regulated financial adviser. That adviser must have a signed agreement with us, except in the case of transfers out, where they must simply hold the appropriate regulatory permissions. This requirement is in place to ensure decisions are made in the best interests of our members and in line with regulatory expectations.

Alltrust reserves the right to decline any instruction that does not meet this requirement.

If you are unsure whether advice is required for your specific request, please contact us before proceeding.

Alltrust Current Terms and Conditions of Business are available to view on our website.

Alltrust Services Limited

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Alltrust is the trading name of Alltrust Holdings Limited (registered in England number 05642425), Alltrust Services Limited (registered in England number 05365396), Alltrust SIPP Limited (registered in England number 05398985) and Alltrust SSAS Limited (registered in England number 07886449) with a registered address of Suite 201, Warner House, 123 Castle Street, Salisbury, England, SP1 3TB. Alltrust Services Limited is authorised and regulated by the Financial Conduct Authority (FCA) under FCA registration number 461966. SSAS and Trustee services are not regulated by the FCA. Any client money held by us is protected in accordance with the FCA's Client Assets (CASS) rules.