



# Property Development Information Schedule

## for UK or overseas hotel, resort or other development investment

For UK or overseas hotel, resort or other development investment in a small self-administered scheme (SSAS), self-invested personal pension (SIPP), or Family Pension Trust with Rowanmoor. The development must have successfully fulfilled the requirements of our due diligence review process. Please complete this Schedule in full using BLOCK CAPITALS and dark ink. There are notes to help you. Any omission could delay the proposed property investment.

Please ensure you complete, sign and date the Declaration before returning it to us.

The information supplied will be held in the strictest confidence and subject to the provisions of Data Protection Legislation.

### Pension details

Name of Rowanmoor  
Arrangement

Rowanmoor Reference  
Number (if known)

# Property Development Information Schedule

## The property

Please provide details of the property and the developer.

Please complete a separate form for each property.

Development Name

Developer's Name

Unit Number

Purchase Price  £

What is the type of ownership?  FULL  FRACTIONAL

Company Name (if fractional)

Number of Fractions

Is the purchase to include staged payments?  YES  NO

Please refer to a Rowanmoor Commercial Property Guide for the definition of a connected party.

Is there any connection between the seller/developer and you or any company contributing to the pension arrangement?  YES  NO

If 'YES' please provide details below:

## Financing the purchase

Please indicate the proposed method(s) of funding the purchase.

Balance of funds will be provided from the following sources:

Contribution(s)	<input type="text"/>	£
Encashment of existing investments	<input type="text"/>	£
Borrowing	<input type="text"/>	£
Transfer from other pension arrangement(s)	<input type="text"/>	£
Existing cash	<input type="text"/>	£
Other (please specify)	<input type="text"/>	£
TOTAL	<input type="text"/>	£

## Solicitor

Please provide the contact name, company name and address of the solicitor who will act for the trustees.

Please note that formal appointment of the solicitor must be made by Rowanmoor Trustees Limited.

Contact Name

Company Name

Address

Postcode

Telephone Number (inc. area code)  Fax Number (inc. area code)

Email

## Declaration

\*Only applicable if more than one trustee.

This is our standard Property Development Information Schedule upon which we intend to rely. For your own benefit and protection you should ensure you have received independent advice on the suitability of the investment.

To be signed by all of the member(s)/trustees.

As a member/trustee(s) of the scheme I/we confirm that:

I/We have taken written advice on the suitability of the investment.

\*We hereby confirm our unanimous agreement to the proposed investment.

I/We are aware that cash or other readily realisable assets must be held in the scheme to meet the ongoing charges.

I/We authorise Rowanmoor Trustees Limited to appoint the solicitor on my/our behalf.

In the event that the purchase does not proceed, for any reason, I/We understand that legal fees will be payable and authorise Rowanmoor to pay the legal fees from the scheme to the solicitor.

The above information is, to the best of my/our knowledge, true and complete and no material details have been omitted.

I/We authorise Rowanmoor to give and request information necessary to complete this transaction and comply with HM Revenue & Customs legislation.

Signature	<input type="text"/>
Print name	<input type="text"/>
Date	<input type="text" value="D D M M Y Y"/>
Signature	<input type="text"/>
Print name	<input type="text"/>
Date	<input type="text" value="D D M M Y Y"/>
Signature	<input type="text"/>
Print name	<input type="text"/>
Date	<input type="text" value="D D M M Y Y"/>
Signature	<input type="text"/>
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