

Application form

How to fill out this form

Please use black ink and CAPITAL LETTERS or tick as necessary.

Any corrections must be initialled.

Please do not use correction fluid as this will invalidate your application.

Curtis Banks are also known as Suffolk Life Annuities Ltd.

Please note:
The first investor will be the point of contact for Prudential.

If the other investors are using their SIPP to invest it must be a Prudential SIPP.

We don't allow a property to be held by more than one SIPP provider.

Some information before you start

You can access Prudential's SIPP by selecting the Self-Invested Fund option from the range of funds available on the Prudential Flexible Retirement Plan. Curtis Banks are working with us to provide the SIPP administration.

This form applies if you want Curtis Banks to acquire property as an investment within your SIPP fund.

This is a legally binding document between you and us (including Curtis Banks). References to "Prudential" and to "us" include Curtis Banks.

Please read "Buying UK Commercial Property Using Prudential's SIPP", the Key Features of the Flexible Retirement Plan (Personal Pension Plan with SIPP options) and "Property Insurance Notes" before completing this form.

These documents are available from your financial adviser.

- Please note that we do not accept the purchase or transfer of a part share in a property in Scotland.
- Please complete this form as fully as possible and sign in both parts (investment and insurance), but do not delay in returning it to us if some details are not known.

How to return this form

Please return the completed form to:

Prudential SIPP
PO Box 737
Ipswich
IP1 9EP

Section 1 – Details of investors

This section is for completion by all planholders who wish to invest. Joint investors should nominate one individual to be our point of contact (and whose details should be the first to be entered in this section).

If there are more than eight investors, please use photocopies of page 2 and attach them to the form.

In connection with this property do you wish Curtis Banks to liaise directly with you or with your adviser? Me My adviser

Title Mr Mrs Miss Ms Other

Full forename(s) Surname

Plan number Phone number

E-mail address Date of birth

Section 1 – Details of investors – continued

Title	Mr	<input type="checkbox"/>	Mrs	<input type="checkbox"/>	Miss	<input type="checkbox"/>	Ms	<input type="checkbox"/>	Other	<input type="text"/>			
Full forename(s)	<input type="text"/>				Surname	<input type="text"/>							
Plan number	<input type="text"/>				Phone number	<input type="text"/>							
E-mail address	<input type="text"/>				Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Title	Mr	<input type="checkbox"/>	Mrs	<input type="checkbox"/>	Miss	<input type="checkbox"/>	Ms	<input type="checkbox"/>	Other	<input type="text"/>			
Full forename(s)	<input type="text"/>				Surname	<input type="text"/>							
Plan number	<input type="text"/>				Phone number	<input type="text"/>							
E-mail address	<input type="text"/>				Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Title	Mr	<input type="checkbox"/>	Mrs	<input type="checkbox"/>	Miss	<input type="checkbox"/>	Ms	<input type="checkbox"/>	Other	<input type="text"/>			
Full forename(s)	<input type="text"/>				Surname	<input type="text"/>							
Plan number	<input type="text"/>				Phone number	<input type="text"/>							
E-mail address	<input type="text"/>				Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Title	Mr	<input type="checkbox"/>	Mrs	<input type="checkbox"/>	Miss	<input type="checkbox"/>	Ms	<input type="checkbox"/>	Other	<input type="text"/>			
Full forename(s)	<input type="text"/>				Surname	<input type="text"/>							
Plan number	<input type="text"/>				Phone number	<input type="text"/>							
E-mail address	<input type="text"/>				Date of birth	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Section 1 – Details of investors – continued

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Section 2 – Property information

Address of the property ("the property").

Residential property is not a permitted investment.

Description and use of the property (eg. warehouse for book storage, solicitors' offices, etc.)

Address

Please give details below of exactly what all parts of the property are currently being used for.

Does the property include living accommodation?

Yes No

If **Yes**, please give details below.

A. Development works

A1. Do you intend to carry out any development works to the property following completion?

Yes No

If **Yes**, please give details below.

B. Disputes

B1. Are you aware of any disputes of any kind in relation to the property or of any circumstances which might lead to any such disputes?

Yes No

If **Yes**, please give details below.

C. Asbestos inspection

C1. Has the property been inspected pursuant to the asbestos regulations?

Yes No

C2. If **Yes**, has an inspection report been prepared?

Yes No

If **Yes**, please supply a copy as soon as possible.

Copy attached

Copy to follow

Copy not available

D. Legal actions

D1. Are you aware of any action, actual or impending, which might be taken with respect to the property by the local authority or any other public authority?

Yes No

If **Yes**, please give details below.

Section 2 – Property information – continued

E. Adjoining properties

E1. Does the property directly adjoin any property already owned by you or a person connected with you?

Yes No

If Yes, please give details below.

F. Contamination

F1. Have you any cause to think that the property may be contaminated in any way?

Yes No

If Yes, please give details below.

G. Unusual provisions

G1. Do any unusual provisions apply? (eg. options, rights, etc.)

Yes No

If Yes, please give details below.

H. Property

H1. Has the property been registered at the Land Registry?

Yes No Not known

H2. Type of ownership of the property

Freehold Long leasehold Commonhold

If long leasehold please give details below.

Ground rent £ each year

Outstanding term of lease years

Type of Acquisition

Property purchase

Proposed date of exchange of contracts

Transfer of property from another pension scheme

I. Site Plan

1. Do you have a site plan readily available?

Yes, attached

Yes, to follow

No. Curtis Banks will request a copy from your solicitor

Section 3 – Lease information

- This section is for details of the occupant or proposed occupant.

Details of lease

Will the existing lease continue after completion? Yes No

Will a new lease need to be drawn up after completion? Yes No

Details of tenant/proposed tenant

Full name(s)

Tenant uses, or intends to use, the property as detailed in Section 2. Other

If **Other**, please give details below.

Address

Postcode

Telephone

Tenant's e-mail address

Rent/proposed rent £ each year Term remaining/proposed term years

Is the tenant You, your business, or someone connected with you? Other?

Is the property, or any part of the property, to remain vacant? Yes, whole Yes, part No

If the property or any party or the property is to remain vacant, please give details below, including how long the property is expected to remain vacant.

What is being stored at the property?

Are any processes being undertaken at the property? Yes No
(e.g. woodworking, manufacturing use of heat etc.)

If **Yes**, please give details below.

Is the property multi-occupied? Yes No

If **Yes**, please provide details, as above, in respect of each tenant on a separate sheet.

In respect of a multi-occupied property, please confirm whether there are any:

Shared common parts? Yes No

Shared common services? Yes No

Please tick.

Please tick.

Please be as specific as possible as this information is important for insurance purposes. (e.g. if a distribution unit, what is being held or if manufacturing what is being made and may be held in the property?)

Section 4 – Details of acquisition

4.1 Property purchase

Will the whole property be purchased by your SIPPs?

Yes No

If **Yes**, please give details below. Otherwise, go to question 4.2

Purchase price

£

Is purchase price subject to VAT?

Yes No

If **Yes**, is the figure inclusive of VAT?

Yes No

4.2 Property part purchase

Purchase price if part share in the property to be purchased by the SIPP(s)

£

Is purchase price subject to VAT?

Yes No

If **Yes**, is the figure inclusive of VAT?

Yes No

Total current value of the whole property (if known)

£

4.3 Property transfer from another pension scheme

Transfer value of the property

£

Is purchase price subject to VAT?

Yes No

Is a full valuation report, no more than seven years old, available?

Yes No

If **Yes**, report is enclosed To follow

Section 5 – Sources of funds

This section is for details of the property purchase. It tells us how you propose to finance the acquisition.

The sources of funds include borrowing, transfer values from other pension schemes, contributions to your SIPP, and existing Prudential Flexible Retirement Plan funds.

Property purchase

Funds for the purchase – these can be assembled from the following:

Transfers

£

Contributions

£

Existing Prudential Flexible Retirement Plan funds

£

Subtotal

£

Less current approximate Prudential Flexible Retirement Plan borrowings

£

Current net fund value

£

If you need your Prudential SIPP to borrow, to purchase or develop the property, your SIPP can only borrow an amount up to 50% of the net value of your Prudential Flexible Retirement Plan fund (less any existing borrowing) at the point of purchase or property development.

Please note that VAT, if payable, must be accommodated within this limit.

Do you need to borrow funds?

Yes No

If **Yes**, please give details on the next page.

Section 5 – Sources of funds – continued

Amount of loan required

Towards property purchase

To cover property development work

Has any lender made an indicative offer? Yes No If Yes, please supply a copy.

Please also complete the lender's details in "Details of lender" below.

Only complete next question if property is being transferred from another pension scheme

Is an outstanding loan attached to the property? Yes No

If Yes, please give details below. Otherwise go to part 6.

Amount outstanding

Are you expecting to transfer the property subject to this loan? Yes No

If Yes, have you spoken with the lender? Yes No

Please also complete the existing or proposed lender's details in "Details of lender" below.

Details of lender

Name of lender

Contact name

Address

Telephone

E-mail address

Section 6 – Professionals

This section is for details of your preferred solicitor and valuer.

Curtis Banks will normally be happy to appoint these professionals to act for them in the property purchase for your SIPP(s).

Solicitor

To purchase or transfer the property and, where necessary, to draw up lease.

Firm

Contact name

Address

Postcode

Phone number

E-mail address

Valuer

To advise on the purchase/the terms of any new lease.

Firm

Contact name

Address

Postcode

Phone number

E-mail address

Please note: Must be qualified and registered with the Royal Institution of Chartered Surveyors (RICS)

Section 7 – Seller/Transferor

This section is for details of the seller (if a property purchase) or the transferor and their solicitor.

Details of seller

Please indicate below whose details are being given.

Seller in respect of a property purchase Is the seller connected with you? Yes No

If **Yes**, please give details of the connection below.

Transfer in respect of a property transfer from another pension scheme

Name

Address

<input type="text"/>
<input type="text"/>
Postcode

Phone number

E-mail address

Details of the seller's/transferor's solicitor

Name

Address

<input type="text"/>
<input type="text"/>
Postcode

Phone number

E-mail address

Section 8 – Declaration, details of ownership and signature(s)

- Please read the declaration before entering details of ownership. All investors involved in the purchase must sign the form.

Investor's declaration

- I/We confirm that I/we have received and read "Buying UK Commercial Property Using Prudential's SIPP" and "Property Insurance Notes" published by Prudential.
- I/We authorise Curtis Banks to instruct the above mentioned solicitor, valuer and, where appropriate, lending source or such other solicitor, valuer or lender as may be decided.
- I/We understand that Curtis Banks will proceed to acquire the property on the basis of the contents of this form and acknowledge that title to the property may be held in the name of a nominee.
- I/We authorise Curtis Banks, during the time my/our Self-Invested Fund within my/our Prudential Flexible Retirement Plan is/are invested in the property to instruct a solicitor, surveyor, or lender as may be decided, when required and that their fees will be payable from my/our Self-Invested Fund within my/our Prudential Flexible Retirement Plan.

Section 8 – Declaration, details of ownership and signature(s) – continued

- I/We understand that before acquiring the property, Curtis Banks will arrange an environmental audit from their chosen provider and that during the time my/our Self-Invested Fund within my/our Prudential Flexible Retirement Plan(s) is/are invested in the property, Curtis Banks may also arrange an environmental audit if advised as necessary by a suitably qualified professional and take such action as it sees fit to mitigate an environmental contamination risk which may include the purchase of insurance and that any costs and charges will be payable from my/our Self-Invested Fund within my/our Prudential Flexible Retirement Plan(s).
- I/We confirm that either:
 - I/We have no connection with the seller and that neither I/we nor anyone connected with me/us has owned the property within the last three years, or
 - I/We have disclosed full details of any connection in Part 7.
- I/We acknowledge that unless legal responsibility rests with a third party, Curtis Banks will arrange for the land and buildings to be insured and that Curtis Banks will retain any commission it is paid in respect of the property insurance policy.
- I/We agree to be solely responsible for my/our share of all costs, fees and charges associated with the ongoing administration of the property (including, where applicable, costs, fees and charges in connection with any aborted purchase or sale and an environmental audit) and these will be payable from my/our Self-Invested Fund within my/our Prudential Flexible Retirement Plan(s).
- I/We agree to be solely responsible for my/our share of all liabilities, losses, damages and costs which Curtis Banks may incur in holding the property and I agree to reimburse Curtis Banks if they are responsible to pay any such liabilities, losses, damages and costs.
- I/We acknowledge that Curtis Banks nor Prudential monitor the property on an ongoing basis. I/We acknowledge that any responsibility for doing so falls upon me/us and that I/we will reimburse Curtis Banks and/or Prudential to be extent of any liabilities, losses, damages and costs which they may incur, for example, as a result of the property becoming or remaining taxable property.
- Where there is more than one investor, liability is acknowledged and agreed to be joint and several. This means that I/we are jointly and individually liable for the whole amount.
- If I/we instruct you to sell the property, or otherwise dispose of it, I /we acknowledge that a valuation of the property will be required at that time.
- Where there is more than one investor, I/We confirm that following completion of the property acquisition, we will sign up to a group investment agreement in a form supplied by Curtis Banks or in such other form as agreed between us and Curtis Banks. I/we acknowledge that Curtis Banks form of group investment agreement is available upon request.
- For your own benefit and protection you need to read carefully the documentation provided before signing this form. You also need to read carefully any further documentation provided to you in the future. If there is anything you do not understand please ask us for further information.

How we use your personal information

For a copy of our latest Data Protection Notice, please visit pru.co.uk/mydata. This details how and why we use your personal information (including any sensitive personal information), who we may share it with and your rights around your personal information. Alternatively, you can request a hard copy to be sent to you by writing to The Data Protection Officer, Customer Service Centre, Lancing BN15 8GB.

Please note that we collect personal information from you that is necessary for us to either provide you with the product or service you've requested or to comply with statutory or contractual requirements. Unfortunately if you don't provide all of the information we require this may mean we are unable to provide our products and services to you.

The proposed percentage shares in the property should reflect the respective contributions towards the purchase price by each investor.

Please complete the following for each investor in the order in which they have been entered in Part 1.

If there are more than eight investors, please use photocopies of this page and attach them to this form.

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name

Percentage share

 %

Please sign.

Section 8 – Declaration, details of ownership and signature(s) – continued

Please sign.

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name

Percentage share

 %

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name

Percentage share

 %

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name

Percentage share

 %

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name

Percentage share

 %

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Name

Percentage share

 %

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Name

Percentage share

 %

Signature

Date

D	D	M	M	Y	Y	Y	Y
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Name

Percentage share

 %

The percentage shares will be finalised after completion and confirmed in a group investment agreement which we will supply, and which all joint investors will need to sign.