



# NEWCOURT

YOUR SELF INVESTED PENSION PROVIDER



## Property Questionnaire: Investing in Property through your Pension Contract

Please complete this questionnaire to provide us with the details of your chosen property (to be completed by either the client or the client's financial advisor)

### Personal Details

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Mobile Number: \_\_\_\_\_

Email address: \_\_\_\_\_

Financial Advisor: \_\_\_\_\_

### Pension Details

Please confirm below the details of the pension arrangement(s) that you are looking to purchase the property through:

Name of Pension Arrangement	Ownership (%)

### Property Purchase

Address: \_\_\_\_\_

Purchase Price: \_\_\_\_\_

Name Of Auctioneer: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Type of Property: Residential  Commercial

What is the amount of the booking deposit? €

**Note:** If you are purchasing the property at auction you must first appoint a solicitor from our panel of solicitors in advance of the auction so that contracts can be reviewed. The deposit must be paid from the pension trust bank account.

Is the property in need of refurbishment and/or does it need to be fitted out? Yes  No

If yes, what is the estimated cost of the refurbishment and/or the cost to fit-out the property?

Refurbishment cost €

Fit-out cost €

What is the anticipated level of rental income? €  per annum

Will the property be registered for VAT? Yes  No

## Appointing a solicitor

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Please provide us with details below of the solicitor you wish to appoint from Newcourt's nationwide panel as detailed on our websites [www.nrfm.ie](http://www.nrfm.ie) and [www.newcourttrustees.ie](http://www.newcourttrustees.ie).

Name of Solicitor: \_\_\_\_\_

Address: \_\_\_\_\_

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## Borrowing

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Are you borrowing to complete the property purchase? Yes  No

If yes, please confirm the following:

Mortgage Broker: \_\_\_\_\_

Name of Lender: \_\_\_\_\_

Loan Amount: €  Term of Loan:  years

## Appointing a Property Management Agent

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The property management agent you select must be licensed and regulated by the Property Services Regulatory Authority. Newcourt has a nationwide panel of property management agents that pension holders can choose from. Please provide us with details below of the property management agent you wish to appoint from our panel as detailed on our websites [www.nrfm.ie](http://www.nrfm.ie) and [www.newcourttrustees.ie](http://www.newcourttrustees.ie), or alternatively the details of your chosen agent.

Name of Property Management Agent: \_\_\_\_\_

Address: \_\_\_\_\_

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## Insurance

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Appropriate insurance cover must be in place before any property purchase is completed. Please provide us with details below of the insurer.

Name of Insurance Provider: \_\_\_\_\_

Quote Reference: \_\_\_\_\_

**Note:** The cost of the insurance cover must be paid from the pension trust bank account. On completion of the purchase of the property, Newcourt will pay the cost of the insurance from your pension trust bank account.

## Declaration

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I confirm that the details provided in this questionnaire are correct to the best of my knowledge and belief and I agree to notify Newcourt of any changes. I understand that the pension contract must have sufficient liquid assets to complete the property purchase and to pay all related costs as well as being able to discharge all fees and liabilities that apply under the contract.

Completed by: \_\_\_\_\_ Date: \_\_\_\_\_