

### Completing this form

**As you complete this form, we'll refer you to the relevant sections of Your guide to Direct Property (SYDPG). Please contact the Property team on (01) 639 7140 or [property\\_team@standardlife.ie](mailto:property_team@standardlife.ie) if you've any questions when completing this form.**

The more information you provide in this questionnaire, the quicker and easier it will be for Standard Life to deal with your request.

You should complete this questionnaire with your financial adviser and send it to the Property team at Standard Life, 90 St Stephen's Green, Dublin 2, who will review it. If you haven't already done so, you may then be asked to complete:

- Your application form (for transfer, single or regular contributions), or
- If an existing policy, your switch instructions

If the property ownership is to be transferred in-specie from an existing pension scheme, you don't have to complete Part 3 - Property purchase details.

If you are purchasing more than one property, please complete a separate questionnaire for each.

Remember that your financial adviser is acting on your behalf not only by giving you advice, but also regarding the completion of this form.

By filling in this form you are applying to enter into a property purchase agreement with Standard Life. This application will be the basis of the agreement if we accept your application. A copy of this completed form is available on request.

**SYPIQ V08 1219**

Calls may be monitored and/or recorded to protect both you and us and help with our training. Call charges will vary.

Revenue require the property purchase to be at arm's length. If you're in any doubt as to what this means or who qualifies as a connected party, call us.

### Part 1 - Your details

Title	<input type="text"/>	Your existing policy number	<input type="text"/>
First names (in full)	<input type="text"/>		
Surname	<input type="text"/>		
Email	<input type="text"/>		
	@	<input type="text"/>	
Date of birth (DD/MM/YYYY)	<input type="text"/>	Phone number	<input type="text"/>

Who do you want to be the first point of contact for all property related correspondence from us?

Financial adviser (see Part 8) or  Policyowner

### Part 2 - Property purchase or transfer

Is the property to be purchased or to be transferred in-specie from an existing pension scheme?

Purchase  Transfer in-specie

### Part 3 - Property purchase details

#### Cost of the property

What is the purchase price? Purchase price

How much stamp duty is payable? Stamp duty

If refurbishment and repairs needed, please estimate cost Amount

If the property needs to be furnished, please estimate cost Amount

If the purchase is subject to a booking deposit, please include the amount Amount

Has the booking deposit been paid?  Yes  No

**Total**

Have you entered into negotiations with the vendor?  Yes  No

If 'Yes', please give details of the terms of the deal below

Give details


Please refer to Your Direct Property Guide (SYDPG) when completing this section.

State currency for all amounts. For example, stg£, €

Refurbishment, repairs and furnishing will be arranged by our property manager.

In addition to these costs, there's also ongoing costs (expected and unexpected). See Your guide to Direct Property (SYDPG) for more information.

### Part 4 - Property information

1. Full address of the property

2. Is the property  Freehold  Long leasehold

Other (give details)


3. Please give brief details of the type of property (for example, 4 bed detached, 3 bed semi-detached, 2 bed apartment)

Give details


4. What Building Energy Rating or Domestic Energy Performance Certificate has the property?

5. In what year was the property built (approx)?  (YYYY)

See Your Direct Property Guide (SYDPG) for BER or EPC minimum.

**Part 4 - Property information (continued)**

6. Is an annual service charge payable?

Yes  No

If 'Yes' please give amount

7. If the property is vacant, what is the estimated monthly rent?

8. What is the approximate overall size of the property?

m<sup>2</sup> or

sq ft

9. Please give details of any parking facilities

Give details

10. Is the vendor connected to you in any way?

Yes  No

If 'Yes' please give details

Give details

11. Is the property completed?

Yes  No

If 'No' please provide the estimated date of completion (DD/MM/YYYY)

12. Is the property covered by structural defect insurance?

Yes  No

13. If the property is currently let, will an existing tenant be remaining in the property after completion of the sale?

Yes  No

If 'Yes' please provide details below

What is the commencement date and term of the lease? (DD/MM/YYYY)

Term  months

What is the current monthly rent?

Amount

How many tenants occupy the property?

Number

Are any of these tenants, family members, or are they connected to you in any way?

Yes  No

If 'Yes' please give details

Give details

State currency for all amounts. For example, stg£, €

See Your guide to Direct Property (SYDPG) for information on arm's length and connected parties or contact us.

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### Part 4 - Property information (continued)

14. Does any refurbishment work or repairs need to be carried out on the property once it has been purchased?

 Yes No

If 'Yes' please tell us what you propose and estimate costs. Also estimate the market value and rental value after completion.

Give details

15. Are you aware of any issues with this property or surrounding area that could have an impact on our ability to proceed to purchase?

Give details

See Your guide to Direct Property (SYDPG) for information on refurbishment.

### Part 5 - Selling agent's details

Company name

Licence number

Email   
@

Address

Contact name

Contact number

Arrangements for access for the valuation made through

Give details

Selling agent must be licensed by PSRA (Ireland) or NAEA (UK).

### Part 6 - Vendor's details

Vendor's full name

Email

Address

Contact name

Arrangements for access for the valuation made through

Give details

### Part 7 - Vendor's solicitor

Name of firm

Email

Address

Contact name

Contact number

DX number

### Part 8 - Your financial adviser's details

Company name

Contact name

Email

Contact number  Financial adviser's  
Standard Life agency code  9 /

## Part 9 - Your declaration

1. I have read the requirements for property purchase and management set out in Your guide to Direct Property (SYDPG) and will comply with these requirements.
2. I agree that Standard Life will own the legal title on this property and will have full authority as landlord.
3. I agree to meet all costs in connection with:
  - (i) the proposed property purchase
    - whether or not the purchase proceeds to completion
    - whether the costs are fees incurred by or on behalf of Standard Life, or are other expenses associated with the proposed purchase.
  - (ii) the ongoing management, letting and subsequent disposal of the property
    - whether the costs are fees incurred by or on behalf of Standard Life, or are other associated expenses.

I agree that these costs will be deducted from my policy, or if there are insufficient funds in my policy, Standard Life will collect the charges as outlined in the Charges section of the policy provisions booklet and may force the sale of the property.

4. I agree to the following:

If I give verbal or written agreement to proceed, Standard Life will instruct a third party valuer and/or a building surveyor to produce reports on the property.

Standard Life will instruct a firm of solicitors (chosen by Standard Life) to undertake all legal work in relation to the purchase of the property if all the feasibility checks are satisfactory.

Once the property is bought, all property management services will be undertaken by Standard Life's appointed property manager. The property management services are set out in Your guide to Direct Property (SYDPG).

I agree that the ongoing management, maintenance, letting and subsequent disposal of the property will be undertaken by 3rd party providers appointed by Standard Life.

Standard Life has the right to appoint their property manager, or any other property manager, to undertake any necessary property management work.

Standard Life will insure the property with an insurer chosen by Standard Life. And I will pay the cost of such insurance.

Standard Life reserves the right not to proceed with a property purchase if:

- on the basis of the reports given by the building surveyor or the valuation surveyor, Standard Life is not satisfied about the quality of the property, the site or the adjoining property, or
- on the basis of work undertaken by the appointed solicitor, there are concerns about the title to the property or the lease, or
- Standard Life has any other reasonable concerns about the purchase of the property.

Standard Life will only enter into a binding legal agreement once we have received all final reports and are satisfied with them.

5. I have discussed direct property investment with my financial adviser and they have explained the rules, charges and processes to me.

**Policyowner signature**



**Date**

(DD/MM/YYYY)

  
Signature

## Part 10 - Your financial adviser's declaration

I have discussed direct property investment with my client and I have explained the rules, charges and processes to them.

**Financial adviser signature**



**Date**

(DD/MM/YYYY)

Financial adviser's name

  
Signature

(01) 639 7140 [www.standardlife.ie](http://www.standardlife.ie) [property\\_team@standardlife.ie](mailto:property_team@standardlife.ie)

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