



# Curtis Banks

# Tenancy Instruction Form

For SIPP & SSAS Properties

If you are purchasing or selling a property this form is not required. Only complete one Tenancy Instruction Form per property.

Please use this form if you want to advise Curtis Banks of:

- the renewal of an existing tenancy; or
- the details of a new tenancy; or
- an assignment of an existing lease to a new tenant; or
- a variation of an existing lease; or
- a surrender of an existing lease

Please complete this form as fully as possible, sign and return to us using the contact details below. All SIPP or SSAS investors who have an interest in the property must sign the form.

This is a legally binding document between you and Curtis Banks. If you have any queries, please contact us or your adviser. We will need the original of this application form before we commence work on leasing the property. Please complete this form using black ink and block capitals.

## How do I submit this form?

You can submit your Tenancy Instruction Form to us using the following contact details:

**Email**            [propertytechnical@curtisbanks.co.uk](mailto:propertytechnical@curtisbanks.co.uk)

**Post**            Property Technical Team  
Curtis Banks Ltd  
3 Temple Quay  
Bristol  
BS1 6DZ

If you have any queries, please contact the Property Technical Team on 0117 332 4103.

For SSAS applications:

**Email**            [ssas.admin@curtisbanks.co.uk](mailto:ssas.admin@curtisbanks.co.uk)

**Post**            SSAS Team  
Curtis Banks Ltd  
3 Temple Quay  
Bristol  
BS1 6DZ

If you have any queries, please contact your usual SSAS team contact on 0117 910 7910.

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## Is this form being completed for:

1. A single member

2. Multiple member purchasers  
(not a group or SSAS)

3. A group scheme  Group scheme name

4. A SSAS  SSAS name

Are all investors using the same  
FCA regulated financial adviser?

Yes  No

If no, please provide individual details in 1.1

Name of adviser

Address

Postcode

Telephone number

Email address

## 1. Details of investor(s)

This section is for completion by all Curtis Banks SIPP or SSAS investors who have an interest in the property investment. 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). We will be entitled to deal with that individual on all matters relating to the letting of the property. Details of any external investors will be required in section 1.2.

If there are more than 3 investors, please use photocopies of page 3 and attach them to the form.

### 1.1 Investors' personal details

Please note: The first investor will be the point of contact for Curtis Banks

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

1 Title Mr/Mrs/Ms/Miss/Other

Forename(s)

Middle name(s)

Surname

Date of birth

Telephone number Home   Work

Mobile

Email address

Property ownership share  % Not required for SSAS or group SIPP investors

I do not have a financial adviser, please treat me as a direct client

Name of adviser

Address

Postcode

Telephone number

Email address

# 1. Details of investor(s)

## 1.1 Investors' personal details (continued)

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**2** **Title** Mr/Mrs/Ms/Miss/Other

**Forename(s)**

**Middle name(s)**

**Surname**

**Date of birth**

**Telephone number** **Home**   **Work**

**Mobile**

**Email address**

**Property ownership share**  % **Not required for SSAS or group SIPP investors**

**I do not have a financial adviser, please treat me as a direct client**

**Name of adviser**

**Address**  Postcode

**Telephone number**

**Email address**

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**3** **Title** Mr/Mrs/Ms/Miss/Other

**Forename(s)**

**Middle name(s)**

**Surname**

**Date of birth**

**Telephone number** **Home**   **Work**

**Mobile**

**Email address**

**Property ownership share**  % **Not required for SSAS or group SIPP investors**

**I do not have a financial adviser, please treat me as a direct client**

**Name of adviser**

**Address**  Postcode

**Telephone number**

**Email address**

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# 1. Details of investor(s)

## 1.2 External investors' details (if applicable)

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Please use this section to provide details of any non Curtis Banks SIPP or SSAS investor(s).

**1** **Title** Mr/Mrs/Ms/Miss/Other

**Forename(s)**

**Middle name(s)**

**Surname**

**Legal owner name**

**Telephone number** **Home**   **Work**

**Mobile**

**Email address**

**Property ownership share**  %

**2** **Title** Mr/Mrs/Ms/Miss/Other

**Forename(s)**

**Middle name(s)**

**Surname**

**Legal owner name**

**Telephone number** **Home**   **Work**

**Mobile**

**Email address**

**Property ownership share**  %

**3** **Title** Mr/Mrs/Ms/Miss/Other

**Forename(s)**

**Middle name(s)**

**Surname**

**Legal owner name**

**Telephone number** **Home**   **Work**

**Mobile**

**Email address**

**Property ownership share**  %

## 2. Property information

### 2.1 Property details

Address of the property  
(the property)

	Postcode (this must be provided)
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Description and current use  
of the property.  
(e.g. warehouse for book  
storage, solicitors' offices,  
etc.)

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

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VAT

Is the property currently VAT registered?

Yes     No

Mortgage

Is there a mortgage secured against the property?

Yes     No

EPC

Do you have a current Energy Performance Certificate?

Yes     No

**Note: It is a legal requirement to produce an EPC for the letting of a commercial property and this must be available before entering into any contract to let. Please let us know as soon as possible if a new EPC is required.**

### 2.2 Current Lease Information

Is there currently a lease  
in place?

Yes     No

**If yes, please provide further details below**

Name and address of Tenant

--

Is there a break option?

Yes     No

Lease expiry or break option  
date?

--

Is any part of the property  
vacant?

Yes     No

**If yes, please provide further details below**

--

Are there any rent arrears?

Yes     No

**If yes, please provide further details below**

Total Amount of arrears

£ 

--

The dates to which the rent  
arrears relate?

--

Is there a rent payment plan  
in place?

Yes     No

**If yes, please provide further details below**

--

Will this lease be assigned or  
surrendered?

Yes     No

If lease is surrendered, will  
the property remain vacant?

Yes     No

**If yes, proceed to section 3.3, if no section 3.1.**

### 3. Details of lease transaction

#### 3.1 Type of transaction

<b>New or renewal lease</b>	<input type="checkbox"/>	<b>Complete tenant and lease terms in 3.2</b>
<b>Assignment of existing lease</b>	<input type="checkbox"/>	<b>Complete assignee details in 3.2</b>
<b>Variation to existing lease</b>	<input type="checkbox"/>	<b>Complete details of any variation in 3.2</b>
<b>Surrender of existing lease and new lease</b>	<input type="checkbox"/>	<b>Complete new lease terms in 3.2 and surrender details in 3.3</b>

#### 3.2 New Lease/Tenancy Information

**Full name and address of new tenant**  Postcode

**Address for rent demands if different to above address**  Postcode

**Contact number**

**Tenant's email address**

**Is the tenant connected to you?**  Yes  No **If yes, please give details below.**

**Will this tenant occupy the whole property?**  Yes  No **If no, please provide details of the vacant property**

**Proposed rent** £  per annum

**Proposed lease term**

**Tenant break option (if any)**

**Rent Review date (if any)**

**Have heads of terms been prepared for this letting?**  Yes  No **If yes, a copy will be required**

**Has a property valuation been prepared?**  Yes  No **If yes, a copy will be required**

**Proposed use of property or nature of tenants business?**

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

**Will any processing be undertaken at the property?** (e.g. woodworking, manufacturing or use of heat etc.)  Yes  No **If yes, please give details below.**  
  
**Please be as specific as possible as this information is important for insurance purposes**

# Details of lease transaction

## 3.3 Surrender of lease

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Full name of tenant

If there any rent arrears will these be settled before surrender?

 Yes  No

If no, please provide details of how these are intended to be dealt with.

Will a surrender premium be payable?

 Yes  No

Please give details below.

Please confirm your future intentions for the property following the lease surrender (e.g. sale or new tenant)

## 3.4 Lender's details, if applicable

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Bank

Contact

Address

  

Postcode

Telephone number

  Fax  

Email address

Note these details will be used to obtain any relevant consent, if required to effect this lease transaction

## 3.5 Tenant's solicitor

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Firm

Contact

Address

  

Postcode

Telephone number

  Fax  

Email address

Note: (1) Tenant's solicitor must be different to the solicitor acting for the SIPP  
(2) Connected parties must have separate legal representation



## 4. Your professionals

This section is for details of your preferred solicitor, valuer, and property agent, if applicable.

### 4.1 Solicitor

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Will you be using a panel solicitor?

Yes  No

If no, please provide details below

**Note: There is an additional fee of £200 for using a non-panel solicitor.**

Firm

Contact

Address

Postcode

Telephone number

  Fax  

Email address

**Note: The panel solicitor represents the pension scheme only**

### 4.2 Valuer

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For any lease transactions involving connected parties valuation advice will be required to support the lease terms or surrender premium payable.

Will you be using a panel surveyor?

Yes  No

If no, please provide details below

**Note: must be qualified and registered with the Royal Institution of Chartered Surveyors (RICS).**

Firm

Contact

Address

Postcode

Telephone number

  Fax  

Email address

**Note: Curtis Banks will instruct the chosen valuer in order to ensure all pension scheme criteria has been met.**

### 4.3 Property Marketing Agent

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Will you be marketing the property using an agent?

Yes  No

If yes, please provide details below

Firm

Contact

Address

Postcode

Telephone number

  Fax  

Email address

## 5. Declaration and signature(s)

For your own benefit all SIPP/SSAS investors should read carefully the declaration below before signing in section 5.2. If you do not understand any point then please ask your adviser or us for further information.

### 5.1 Investor's declaration

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#### Declaration

- I/we authorise Curtis Banks to instruct the above mentioned solicitor, valuer and where appropriate, marketing agent or such other solicitor, valuer or marketing agent as may be decided.
- I/we understand that Curtis Banks will issue instructions in line with the information provided in this application form.
- I/we confirm that either:
  - I/we have no connection with the tenant, or
  - I/we have disclosed full details of any connection in section 3.
- I/we confirm that all parties to the transaction have read and understood the requirements detailed in the property guide and agree to be solely responsible for my/our share of all costs, fees and charges (as detailed on the Fee Schedule and within the Property Guide).
- I/we acknowledge that Curtis Banks are not responsible for determining the suitability of any new tenant and I/we understand that Curtis Banks will not be liable for any claims.
- I/we agree to be solely responsible for my/our share of all liabilities, losses, damages and costs which Curtis Banks may incur in disposing of the property and I/we agree to reimburse Curtis Banks if they are responsible to pay any such liabilities, losses, damages and costs.
- I/we authorise you/the solicitor to contact any lender, where there is a mortgage secured against this property to advise them of the transaction and request any necessary consent which may be required.
- I/we acknowledge that in the event of the new tenant or lease amendments not proceeding, for whatever reason, that abortive costs may be payable.
- All relevant information has been provided.

### 5.2 Signature(s)

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Please complete the following for each investor in the order in which they have been entered in section 1.1. If there are more than 3 investors, please use photocopies of this page and attach them to the form.

<b>1</b>	<b>Name</b>	<input type="text"/>		
	<b>Signature</b>	<input type="text"/>	<b>Date</b>	<input type="text"/>

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<b>2</b>	<b>Name</b>	<input type="text"/>		
	<b>Signature</b>	<input type="text"/>	<b>Date</b>	<input type="text"/>

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<b>3</b>	<b>Name</b>	<input type="text"/>		
	<b>Signature</b>	<input type="text"/>	<b>Date</b>	<input type="text"/>

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#### Submitting your instruction form

**For SIPP applications**      **Email:** [propertytechnical@curtisbanks.co.uk](mailto:propertytechnical@curtisbanks.co.uk)  
**Post:** Property Technical Team, Curtis Banks Ltd, 3 Temple Quay, Bristol BS1 6DZ

**For SSAS applications**      **Email:** [ssas.admin@curtisbanks.co.uk](mailto:ssas.admin@curtisbanks.co.uk)  
**Post:** SSAS Team, Curtis Banks Ltd, 3 Temple Quay, Bristol BS1 6DZ