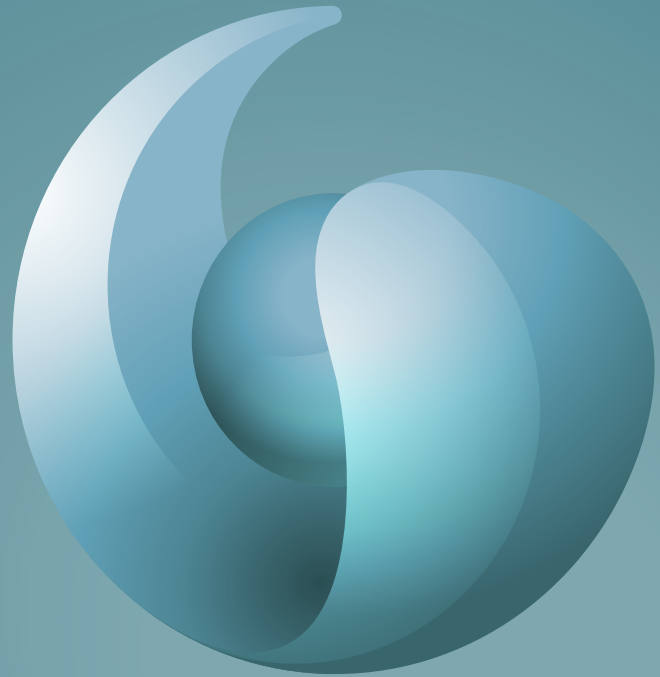


# WMPP SSAS

Loan Application



# Contents

<b>Section</b>	<b>Page</b>
1. Introduction	3
2. Scheme Details	3
3. Borrower Details	3
4. Details of the Proposed Loan	4
5. Loan Security	4
6. Solicitor Details	4
7. Declaration	5
8. Regulatory	6

## 1. Introduction

Introduction to a SSAS loan application for a commercial property purchase. To apply for a loan you must have a self-administered scheme (SSAS).

### Loan application process

Initial stage - we recommend that you discuss your goals with a regulated financial adviser to assess the suitability of purchasing a commercial property through a SSAS.

Property selection - identify the commercial property that you wish to purchase.

Loan application - complete the loan application and return it to iPensions Group along with a copy of the RICS valuation report. The report must include the current market value of the security property and any properties held in the pension scheme. In addition, the report should be addressed to the Trustees of the pension scheme.

Approval - upon approval of the loan this will be issued to facilitate the property purchase.

Ongoing management - the property will be managed as part of the pension scheme.

## 2. Scheme Details

Member's Name

SSAS Name

SSAS reference number

## 3. Borrower Details

Borrower Name

Company Name

Company's Trade or Business Address

Type of Business

CRN

Contact Number

Email Address

Borrower Connected?

Yes

No

\*If yes, how is the borrower connected to the SSAS?

## 4. Details of proposed Loan

Please provide details of the terms for the proposed Loan to the company:

 %

Repayment schedule:

Weekly  Monthly  Annualy

## 5. Loan Security

## 6. Solicitor Details

## 7. Declaration

- I/We declare that to the best of my knowledge that the information I have provided is accurate and complete.
- I/We confirm that I/We are solely responsible for the investments and the outcome of those investments.
- I/We understand that iPensions Group Limited and its trustees have given no advice in relation to the suitability of the investments.
- I/We understand that iPensions Group Limited will issue instructions in line with the information I/We have provided in this application form.
- I/We have taken the appropriate legal and financial advice.
- I/We declare that the proposed loan is for the purposes of the borrower's trade or business.
- I/We declare that the proposed loan is not to keep an ailing business afloat.
- I/We declare that the proposed loan is not to an insolvent company.

Name

Date

Signature

Name

Date

Signature

Name

Date

Signature

Name

Date

Signature

Name

Date

Signature

Name

Date

Signature

## 7. Declaration (Continued)

Name

Date

Signature

Name

Date

Signature

Name

Date

Signature

Name

Date

Signature

Name

Date

Signature

Please send this form to:

iPensions Group Limited  
2nd Floor, Marshall House,  
2 Park Avenue,  
Sale, M33 6HE

Tel: 0161 972 2840  
Fax: 0161 972 2841

## 8. Regulatory

W M Pension Trustee Services Limited is wholly owned by iPensions Group Limited. iPensions Group Limited is registered in England and Wales with Company Number 03683070 whose registered office is at 2nd Floor, Marshall House, 2 Park Avenue, Sale M33 6HE. Authorised and regulated by the Financial Conduct Authority, Licence Number 464521.

Telephone: 0161 972 2840.