

PROPERTY INVESTMENT QUESTIONNAIRE

Please refer to our *Property Guidelines Document* before completing this form.



As the beneficiary directing the investment of your fund, you should be aware that certain investment restrictions apply to your fund in relation to the acquisition of property. Please complete the Questionnaire below in order that Quest Retirement Solutions Ltd can determine whether the property in question can be acquired by your fund to hold as an investment.

Type of Pension: ARF PRB PRSA

Name of Fund: Name of Beneficiary:

PROPERTY TO BE ACQUIRED

Residential Commercial Holiday Other

Address of property:

Current use of the property:

Is the property currently let? Yes No

Do you, or anyone connected with you¹, own a property in the locality either personally or through a pension? Yes No

If yes, please provide further details:

Purchase Price: € Estimated Refurbishment/Fit Out Cost: €

Does VAT apply on the purchase? Yes No Has a booking deposit been paid? Yes No

If yes, please confirm how much: €

Name of Estate Agent listing the property:

Email Address of Estate Agent listing the property:

DETAILS OF THE VENDOR OF THE PROPERTY

Name of the Vendor:

Is the Vendor connected¹ to you? Yes No If yes, please give more details:

Have you or anyone connected with you previously owned this property? Yes No

If Yes please give more details

PROPOSED USE OF THE PROPERTY

Do you, or anyone connected with you, intend to use the property as a residence or holiday home? Yes No

Do you, or anyone connected with you, intend to use the property in the course of a business in which you or anyone connected with you is involved? Yes No

Will the property be let or used by you or anyone connected to you, in the course of a business? Yes No

Is it proposed to sell on the property, or develop and sell on the property, within 5 years of acquisition? Yes No

¹Please refer to the terms and conditions document for your structure for more details in relation to connected parties.

PROPERTY MANAGEMENT COMPANY DETAILS

Is there a Property Management Company agreement currently in place? Yes No

If yes, please provide details:

Name

Address

Email Address

Phone No.

NOMINATED SOLICITOR

Please provide details of your nominated solicitor.

Please provide details:

Name

Address

Email Address

Phone No.

FEES

Quest Retirement Solutions will apply a once off administration fee of €1,000 per property where property is being bought through your self directed pension. This fee relates solely to services provided by Quest and are not related to any third party fees including appointed solicitors. This fee does not currently apply where the property is being purchased via a PRSA.

DECLARATION

I have received, read and understood the investment restrictions. I declare that the answers provided in this Questionnaire are correct and complete to the best of my knowledge. I understand and accept that if the proposed property investment above does not comply with Revenue and tax legislation requirements, Quest Retirement Solutions Ltd cannot consent to the proposed acquisition of that property.



Signature of Beneficiary

Date: / /

DATA PROTECTION NOTICE

Quest Retirement Solutions Ltd ('Quest Retirement Solutions') will keep the information you provide, for the purposes of, and in connection with, this application, about yourself and about third parties confidential. Quest Retirement Solutions will use it to administer this application and any subsequent appointment (agreement), and in order to comply with legal obligations imposed on it. Quest Retirement Solutions is committed to safeguarding your personal data through its obligations under the Data Protection Acts. Further details of our data processing practices and your data protection rights are included in our Data Protection Policy. This policy is available on our website and/or in hard copy format from Quest Retirement Solutions Ltd., Unit 2A Elm House, Millennium Park, Naas, Co. Kildare.

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