PHOENIX WEALTH

RETIREMENT WEALTH ACCOUNT

SALE OR TRANSFER OF PROPERTY

Phoenix Wealth Property Purchase Team, Lambert Smith Hampton, UK House, 180 Oxford Street, London, W1D 1NN.

This form can be used to sell or transfer a property held under the Retirement Wealth Account.

When completing this form:

- signatures are required on page 4
- if you have any questions regarding the completion of this form, please contact us on 020 7198 2190
- it is essential that you provide all the information requested. If you do not, there may be a delay in processing your request.

1. PROPERTY DETAILS

Name(s) **of member**(s)	
Membership number(s)	
Address of property (including postcode)	

Notes to complete section 1

1. A person is connected with an individual if that person is:
   - the spouse or civil partner of the individual, or
   - a relative of the individual, or
   - a relative of the individual's spouse or civil partner, or
   - the spouse or civil partner of a relative of the individual, or
   - the spouse or civil partner of a relative of the individual's spouse or civil partner.
2. A company is connected with another company
   (a) if the same person has control of both companies or a person has control of one and persons connected with him, or he and persons connected with him, have control of the other; or
   (b) if a group of two or more persons has control of each company, and the groups either consist of the same persons or could be regarded as consisting of the same persons by treating (in one or more cases) a member of either group as replaced by a person with whom he is connected.
3. A company is connected with another person if that person has control of it or if that person and persons connected with him together have control of it.
4. Any two or more persons acting together to secure or exercise control of a company shall be treated in relation to that company as connected with one another and with any person acting on the directions of any of them to secure or exercise control of the company.

Please confirm if the new property owner will be:

- ☐ a sponsoring employer or any person connected with that employer
- ☐ a person who is a director of, or a person who is connected to a director of, a close company that is also a sponsoring employer
- ☐ a person who is either a sole owner or partner or person connected with the sole owner or partner of a business which is the sponsoring employer
- ☐ a member, person or company connected with the member
- ☐ a member, person or company not connected with the member
- ☐ another registered pension scheme.

Is the property subject to an existing lease? ☐ Yes ☐ No

Is the property being ☐ Sold ☐ Transferred to another registered pension scheme

Please provide the name and address of the valuer you wish to use* (including postcode)	
Sale price (exclusive of VAT if applicable)	£
Reference number	

*An up-to-date valuation of the property must be provided by a RICS-qualified surveyor if the property is being sold. The valuation report must be addressed to the Trustees of Wealth Personal Pension Scheme A, quoting the property reference number.

If the property is VAT registered please state: ☐ VAT to be charged ☐ Transfer of a going concern

Solicitor details

Phoenix Wealth will use a solicitor from its panel, all of whom are experienced in self-invested pension property.

2. SELLING AGENT DETAILS

Name	
Address (including postcode)	
Telephone number	
Fax number	

Solicitor details

The solicitor acting for the selling agent cannot be the same solicitor acting for the pension scheme.

Name of the firm	
Contact name	
Email address	
DX number	
Telephone number	
Fax number	

3. PURCHASE/RECEIVING SCHEME DETAILS

Name	
Address (including postcode)	
Email address	
Telephone number	
Fax number	

If the property is being transferred to another registered pension scheme, please provide the Pension Scheme Tax reference (PSTR):

Solicitor details

The solicitor acting for the selling agent can't be the same solicitor acting for the pension scheme.

Name of the firm	
Contact name	
Email address	
DX number	
Telephone number	
Fax number	

4. SURVEYOR DETAILS (FOR SALES TO AN UNCONNECTED THIRD PARTY ONLY)

The scheme will select a RICS-qualified surveyor for property sold to a connected party.

For sales to an unconnected third party, please provide details of the surveyor, who must be RICS-qualified.

Name of the firm	
Contact name	
Address (including postcode)	
Email address	
Telephone number	
Fax number	

5. AUTHORISATION

I/we hereby authorise Phoenix Life Limited as the Scheme Administrator of the Retirement Wealth Account to sell or transfer the property as detailed in section 1 on my/our behalf as part of my/our pension fund assets.

I/we acknowledge that in the event of the sale or transfer not proceeding, for whatever reason, all of the costs incurred will be met by me/us.

Note: Any fees associated with this property sale will be payable directly from the pension fund.

Member's full name	Signature ✖	Date / /
Member's full name	Signature ✖	Date / /
Member's full name	Signature ✖	Date / /
Member's full name	Signature ✖	Date / /
Member's full name	Signature ✖	Date / /

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