



Development / Investment Agency Questionnaire

1. Where Commercial Estate Agency is declared, please advise the percentage that derives from investment agency work (if not already declared separately) _____%

2. Of this investment work please advise what percentage relates to;

a) investment property sales only _____%

b) identification / selection / site finding of property or land on behalf of clients for their investment portfolio? _____%

c) property / land acquisitions _____%

d) advice, whether written or verbal, on the likely investment return from acquisition, development or sale of such property or land? _____%

3. Please provide **full** details of 3 largest transactions in respect of 2(d) above in last 3 years below. Please use a separate sheet if necessary

i)

ii)

iii)

4. Referring to 2 (b) & 2(c) above;

a) does the Practice negotiate the acquisition of property or land on behalf of clients? YES/NO

b) will the client always make the final decision as to whether the property or land identified is to be purchased? YES/NO



5. Please advise what disclaimers are used, if any, when providing property investment advice. Please provide copies if available.

6. If disclaimers are not used when giving property investment advice, please advise the reasons why they are not used.

7. Where the client requires funding, is a separate bank valuation obtained through a panel valuer? YES/NO

Signed
(Partner/Director)

Date

On Behalf Of
(Practice Trading Name)