

Checklist:

Real-estate-buying /-selling

Preliminary studies before the purchase of business, industrial or commercial real estate

The purchase of real estate requires thorough clarifications of public and private legal requirements. Only based on the comprehensive knowledge of the situation can a contract be drawn up which bears in mind all the needs and interests - an absolute prerequisite if the real estate deal is to be fair to all contracting parties. The following information is to be obtained and verified with regard to any specific situation:

Situation under public law

Local building board

- Building code and zoning regulations
- Design schemes / special building regulations
- Admissible use
- Utilisation ratio/building volume coefficient
- Existing utilisation assignment
- Pending rezoning procedure
- Development sufficient in law (traffic, electricity, water, sewage, streets)
- District plan pending or planned / necessary district plan proceedings
- Development quotas (paid/not paid)
- Building lines
- Taking up the building line area
- Building permits for existing buildings or parts thereof
- Building permits for conversions/alterations
- Building projects in the vicinity
- Building permit for a new building
- Use of parking lot: Number of authorised and potentially authorisable parking spaces
- Environmental compatibility
- Classification as historical monument (building/garden), contributions
- Archaeological zone
- Nature conservation / protected trees
- Green areas
- Ownership restrictions under public law

Statistical office of the municipality, the canton, the Confederation

- Perusal of evaluations and statistics

Cantonal authorities

- Inspection of the cadastral register of affected locations or locations requiring cleanups
- Existence of a preliminary study, or possibly even an approved rehabilitation project
- Findings from subsurface explorations in the neighbourhood
- Trade permits
- Development projects: roads / public transportation
- Water protection zones
- Noise level rating
- Air protection measures
- Admissibility of the purchase pursuant to the permit act

(Real estate) tax authority (primarily in cantons with property tax in case of a change of real estate ownership)

- Assessment of previous changes of ownership
- Payment of previous real estate gains taxes and change of ownership taxes
- Calculation of potential taxes in case of a planned purchase
- Security for taxes in case of a planned purchase
- Taxes in case of an assignment of contract (chain deal)
- Taxes in case of a commercial change of ownership

Situation under private law

Landed property register

- Abstract of title
- For condominium property (StWE): Use and management regulations
- Co-ownership: User regulations
- Land lease: Right to build agreement
- Text excerpts record of easements
- Copies of easement plans
- Ascertaining of notary's fees and landed property dues as well as possible taxes on change of ownership

Geodetic surveyor

- Cadastral map

Building insurance

- Insured value
- Appraisal record with volumetric content calculation
- Extent and terms of insurance

Real estate appraiser (careful selection recommended)

- Ocular inspection
- Quality of community
- Quality of location
- Access development (public and private transportation)
- Quality of buildings /condition of buildings/shortcomings
- Leaseability
- Utilisation mix
- Tenant level/ revenue
- Volumetric content
- Operations report of the past five years (vacancy quota, fluctuation rate, tenant mix, maintenance costs)
- Existence and accrued capital of a condominium renewal fund
- Need to carry out neglected maintenance / age category

- Technical equipment
- Ecological risks
- Potential (other uses)
- Value-reducing and value-increasing easements and other entries in the land register
- Market value
- Rateable value
- Real value
- Resaleability

Bank

- Financing of property purchase
- Building loans
- Presentation of reliability and creditworthiness
- Mortgaging
- Comparable prices

Current contractual relationships (compulsory relationships to be taken over)

- Obligation to build
- Obligation to a specific architect
- Management agreements
- Janitor services
- Contracting agreement/Energy supply agreement
- Facility management agreement
- Maintenance agreements
- Insurance (liability, water, theft etc.)
- Leasing agreements
- Tenancy agreements
- Usufruct / right of residence