



Jo Morgan

Head of Commercial Property

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Jo Morgan has headed the Commercial Property team for over 4 years, following numerous years as a Partner on the management team of the successful Residential Property team. Management of the team involves all aspects of planning, strategy, research and day to day running of the department.

Jo is also an experienced lawyer having spent over 20 years dealing with property matters. Her client work is focused on, but not limited to, the development sector. She acts on behalf of a number of established developers and landowners across the region handling a range of associated work, as detailed below as well as handling a range of other commercial property matters.

She is also involved in the wider management of the firm heading up the Agility Team and involved in internal projects.

Expertise

Commercial property

Jo's client work is focused in the Development sector, and she acts on behalf of a number of established developers and landowners across the region. She is primarily involved in site acquisitions and disposals, conditional Contracts, refinancing, site setups, associated section agreements, options, overage agreements and sub-sales.

She is also experienced in handling the buying and selling of commercial property primarily in the leisure and tourism sector. This includes advising on all aspects of property dealings within a business transfer for a range of businesses including touring parks, mixed leisure facilities, holiday complexes, food outlets and beauty salons.

Notable Commercial property cases

Option, Section 106 & Sub Sale on Development Land

Work included advice, investigation of title and due diligence to secure a call Option with associated Overage Agreement, acting in the agreement for the S106 which resulted in planning consent for 36 homes with an affordable and open market mix.

The exercise of the Option was then co-ordinated with a back-to-back sub sale of part and advice given to deal with the access requirements, services and initial

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infrastructure to enable the development parcel whilst ensuring protection of the client's retained land.

Site Setup & Plot Sales

Acting in the setup of a luxury development with a mix of shared common parts. Advising client in initial setup phase to include advice on creation of a Management Company, pre-approval of site plans by the Land Registry, advice on shared facilities and rights of access and services required by each property. Then dealing with the successful sale of each unit and transfer of common parts to the management company and conclusion of the site.

Purchase of Touring Park

Purchase of Touring Park, mixed- use development and Grade II listed building. Acting in the acquisition of a mixed- use site and transfer of campsite business. Work included commercial due diligence, advice on site specific licence arrangements, rectification of inadequate service arrangements and easements as well as agreeing terms of the Asset Purchase Agreement.

Purchase of a Business Park

Acting in the purchase of a business park in Cornwall subject to a number of pre-existing business leases and involving a private finance arrangement. Dealing with the due diligence required for the purchase, reporting on the occupancy rights, planning position, easements and co-ordinating with the 3rd party Solicitor to satisfy their due diligence requirements and ensure funds release.

Acquisition of Development Land

Acting for a development company in acquisition of development land over £700K. Work included advice on conditions of planning consent, Section 106 obligations, impact of covenants that bind the land and advice on specific searches and investigation to be carried out for land to be developed.

Purchase & Development of Old School

Purchase of a development site of an Old School building acquired from an Education Charity Trust. Due diligence included liaising with a non-exempt charity and resulting considerations. Advice given on acquiring ongoing commercial property and use change to a development site. Dealing with consideration for access and service requirements and conditions of an existing Planning Consent.

Re-finance of Development Site

Re-finance of a development site. Dealing with the refinance of a development site including resolving an ongoing issue regarding inadequate easements and breach of a pre-existing covenant. Outcome included successful coordination of the re-finance with the discharge of ongoing bridging finance, within the required deadline.

Qualifications & Accreditations

- CILEX Conveyancing Practitioner (2015)

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Memberships

- Cornwall CILEx (Branch Chairman)
- Cornwall Property Professionals Association

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