

SSAS Set up questionnaire

Telephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com

Name of Scheme

ALDERLEY WEALTH MANAGEMENT RBS.

Name of Company/

Employer creating the Scheme

ALDERLEY WEALTH MANAGEMENT LTD.

Serving Address for

Pension Correspondence

6 HAWTHORN RISE

PRESTBURY

CHESHIRE

SK10 4AJ

Telephone Number

0711 184286.

Contact Name

CHRIS BURGESS.

Email Address

cjburgess14@gmail.com.

Accountant Details

Name of the Company

STERLING PARTNERS

Contact Name

Telephone Number

0161 446 2112

Email Address

info@sterlingpartners.co.uk

Address

774-780 WILMSLOW ROAD

DIDSLEY, MANCHESTER M20 2DR

Financial Advisor Details

Name of the Company

Contact Name

Telephone Number

Email Address

Address

2 SSAS Set up questionnaire

Telephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com

Trustees

Trustee 1 Title (Mr, Miss, Mrs) Mrs

Forename(s)

COLLEEN KATHLEEN

Surname

BURGESS

Date of Birth

02.03.1954

Proposed Retirement Date

70

National Insurance Number

SJ 355 357 B

Home Address

6 HAWTHORN RISE

PRESTBURY

CHESHIRE

SK10 4AJ

Is this Trustee also a Member?

☒ Yes ☐ No

Trustee 2 Title (Mr, Miss, Mrs) Mr

Forename(s)

CHRISTOPHER JAMES

Surname

BURGESS

Date of Birth

14.2.59.

Proposed Retirement Date

70

National Insurance Number

WE 242 736 B

Home Address

6 HAWTHORN RISE

PRESTBURY

CHESHIRE

SK10 4AJ

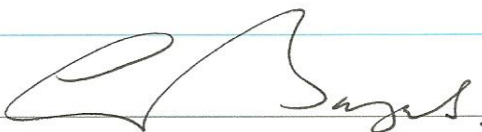
Is this Trustee also a Member?

☒ Yes ☐ No

Please return this form to:
info@pensionpractitioner.com

Alternatively, post this form to:
Pension Practitioner .Com
Daws House
33-35 Daws Lane
London NW7 4SD

Signed





Date