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| --- | --- |
| Client Name/s | Myrefield Ltd |
| Scheme Name | Bowers SSAS |
| What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution | Scottish Widows Personal PensionAegon Personal PensionFriends Life Personal Pension |
| What are the Transfer values/contribution amount | Approx £320,000 |
| What percentage of customers funds are going into non standard investments | 0% |
| Investment Selection with approximate amounts allocated per selection | Commercial Property – Value to be decided |
| The number of people employed by the scheme establisher |  |
| Current employment status |  |
| The corporation Tax reference of the employer The VAT registration number of the employer PAYE reference | 623 20620 05462 A 24Not registered Not registered  |
| Is the proposed Limited Company currently active | Yes |
| Financial Adviser Involved  | David Thompson – TAG Wealth Management |
| If no Financial Adviser – explanation why  |  |
| Classification of Client | Retail |
| Any web based material; |  |
| Introducers | N/A |
| Details of investments  | See above |
| Explanation as to why customer is setting up a SSAS | To provide retirement fund for company directors. |