

SSAS Set up questionnaire

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

Name of Scheme LIFTER2 SSAS
Name of Company/
Employer creating the Scheme LIFTER2 LTD
Serving Address for
Pension Correspondence MILNER WAY
OSSETT
WAKEFIELD
WF5 9JE
Telephone Number 0845 180 0008
Contact Name MALCOLM BOWERS
Email Address MALCOLM.BOWERS@LIFTER2.CO.UK

Accountant Details

Name of the Company

Contact Name

Telephone Number

Email Address

Address

Financial Advisor Details

Name of the Company TAG WEALTH MANAGEMENT
Contact Name PETER BEST / DAVID THOMPSON
Telephone Number 0114 263 0888
Email Address info@TAG-UK.COM
Address RIVERDALE
89 GRANAM ROAD
SHEFFIELD S10 3GP

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

Trustees

Trustee 1 Title (Mr, Miss, Mrs) MR

Forename(s) MALCOLM

Surname BOWERS

Date of Birth 4/2/49

Proposed Retirement Date

National Insurance Number YM597490 B

Home Address 120 PADDOCK ROAD
KIRKBURTON
HUDDERSFIELD
HD8 0TT

Is this Trustee also a Member?

☒ Yes ☐ No

Trustee 2 Title (Mr, Miss, Mrs) MR

Forename(s) BENJAMIN JAMES

Surname BOWERS

Date of Birth 15/8/78

Proposed Retirement Date

National Insurance Number JG525857 B

Home Address 87 DENBY LANE
UPPER DENBY
HUDDERSFIELD
HD8 8TZ

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