

Toni Ross

From: Toni Ross <toni.r@cranfords.biz>
Sent: 30 July 2014 09:13
To: 'David Hargreaves'
Subject: RE: yet another tax assist client
Attachments: Administration Agreement.pdf; SSAS Establishment Authority Letter 30.07.2014.docx; SSAS Trust Deed and Rules.pdf

Morning David,

I was only kidding about lunch, but please do pop in to meet the team when you are ready. ☺

Meantime, I enclose the Deeds & Rules and Admin Agreement etc for this scheme.

Can you please arrange to correct the address on the SSAS Application Form before the signed copy is sent to us, the Principal Employer address has a number missing (I think it should be 304 not 30).

Also, can you arrange for Susan to also complete a Nomination of Beneficiaries page please? (And remind the members not to date the deed or the admin agreement!)

Aegon transfers can be requested online so we won't need any additional documents for the transfers to proceed. Once we have the documents returned to us fully signed we will complete the ID check and proceed to register the scheme and open the scheme bank account. If the members ID checks fail then we'll come back to you for original or certified ID documents to proceed.

Thanks very much

Toni Ross
Technical Director

T: 0844 410 0037
F: 0845 410 0038



1 The Pavilions, Cranford Drive, Knutsford, Cheshire WA16 8ZR

From: David Hargreaves [<mailto:david.h@charterhousewealth.co.uk>]

Sent: 29 July 2014 17:35

To: 'Toni Ross'

Subject: yet another tax assist client

Toni

I have attached the details of man and wife tax assist team, the Hampson's

Still chasing the others.....

I am free for Monday lunch?

Kind Regards

David Hargreaves

External Affairs Consultant



Direct line 0843289 6437

Mobile 07809 331 071

Email david.h@charterhouseuk.co.uk

Skype davidhugohargreaves

www.charterhouseuk.co.uk

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