

Pension Scheme Account Opening Request

Email to (preferred option): Partnership.Support@metrobank.plc.uk

Post to: The Manager, Partnership Support, Metro Bank PLC, One Southampton Row, London, WC1B 5HA (if enclosing a cheque, please use this option)

1. PENSION SCHEME DETAILS

Type of Pension Scheme (e.g. SIPP, SSAS) Full Name of Pension Scheme

SSAS

C & A Pension Scheme

Full Name of Pension Provider

RSA Scheme Administrator Ltd

Full Name and Address of Professional Trustee

Full Name and Address of Scheme Administrator (if different to Professional Trustee)

Registered Scheme Administrator Ltd
Venture Wales
Merthyr Tydfil
CF48 4DR

HMRC registration number of the Pension Scheme

00813397RY

Does Employer pay premiums/contributions? ☒ Yes ☐ No

If yes please provide Full Name and Address of Employer and the company registration number (if applicable)

Are statements required?

☐ Yes ☒ No

AUTOTRADE SOLUTIONS LIMITED
Unit 5 Bassendale Road, Croft Business Park,
Bromborough, Wirral, Merseyside, CH62 3QL
Company number 04681251

2. MEMBERS AND TRUSTEES Please add below details of all scheme members and trustees

First Scheme Member/Trustee (please delete as appropriate)

Title Mr.
First Name Carl
Middle Name(s) John
Surname Allenson
Date of Birth 27-07-1964
Gender Male
Nationality British
Country of Birth England
Home Telephone Number 07772291226
Mobile Number 07772291226

Email Address Carl@garageequipmentgroup.co.uk
Current Address Treetops
Nocturn Road
Prenton
Wirral
Date moved in 05/01/2008

Are statements required? ☐ Yes ☒ No

Is this individual a Scheme member? ☒ Yes ☐ No

Is this individual a Member Trustee? ☒ Yes ☐ No

Is Online Banking required? ☒ Yes ☐ No
(Please note View Only Access is available.
A mobile number is required for the setup so
please ensure this has been completed
on the form)

OPEN 7 DAYS

Monday - Friday: 8am - 8pm • Saturday: 8am - 6pm • Sunday: 11am - 5pm
Local Call Centre: 0345 08 08 500 • metrobankonline.co.uk • MetroBank_Help

pg 1

Pension Scheme Account Opening Request *(continued)*

7. DECLARATION AND SIGNATURE(S)

Fraud Prevention Agencies

If you give false or inaccurate information and fraud is identified or suspected, details may be passed to fraud prevention agencies and/or CRAs to prevent fraud and money laundering. Law enforcement agencies may access and use this information.

You authorise Metro Bank to disclose details of your account(s) to your professional adviser (as detailed below) and your pension provider as named on the application form, or their successors in title.

Declaration

Metro Bank's decision to offer you this Pension Scheme Bank Account is based on the information set out in this application. By applying for this Pension Scheme Bank Account, you declare that the information set out in this application is, to the best of your knowledge and belief, correct and not misleading. If any of the information provided in this application changes you must inform Metro Bank promptly in writing.

Your Pension Scheme Bank Account will be subject to the terms and conditions outlined in the documents "Our Service Relationship with Business Customers" and the "Important Information Summary" for this product. If your scheme has more than one trustee you will be applying for a joint account, you acknowledge that each of you is separately responsible for complying with the document "Our Service Relationship with Business Customers" and the "Important Information Summary". If any one of you does not comply, Metro Bank can take action against any or all of you alone or together.

Before signing this Pension Scheme Account Opening Request you should carefully read the document "Our Service Relationship with Business Customers" and the "Important Information Summary" for this product. If there is any term that you do not understand, please discuss it with a Metro Bank Partnerships Service Centre Specialist before signing.

I certify that I have reviewed the Pension Trust Deed in respect of the above named Pension Scheme and:

- The pension has been properly constituted
- The details shown above are complete and accurate
- The Trustees are empowered to open an account at Metro Bank PLC
- The Trustees are empowered to operate the account/to appoint representatives to operate the account
- To facilitate operations on the account the Trustees are empowered to utilise any electronic banking service available from Metro Bank PLC
- The Trust Deed will be available for inspections by the Bank, if required and that the copy will be retained for a period of 7 years after the account has closed
- The signatories on the account mandate (section 6) have been authorised and appointed by all the trustees or the trustees' representatives
- We permit Metro Bank PLC to make enquiries to HMRC to confirm this scheme is registered with them for tax relief and exemptions and we authorise HMRC to provide this information to Metro Bank PLC upon request

By signing this form we acknowledge receipt of details of the Financial Services Compensation Scheme Information Sheet.

The liability of the professional trustee as set out in section one for any indebtedness arising from time to time on the Account(s) shall be limited to the assets of the scheme.

We confirm that the Account is to be subject to the Pension Scheme Bank Account Important Information Summary and the Terms and Conditions as set out in "Our Service Relationship with Business Customers".

I/We hereby authorise Metro Bank PLC ("The Bank") to deduct from my/our Pension Scheme Bank Account such management charges/fees and adviser charges/fees as may be notified from time to time to the Bank under the sole instruction of two authorised signatories of the Professional Trustee as named in Section 1 above.

Professional Trustee(s)

Print name

Georgina Martin

Signature

Georgina Martin

Position Administrator

Date 14 July 2022

Print name

Carl Allenson

Signature

Carl Allenson

Position

Customer

Date 14/7/2022

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pg 8