

SSAS Set up questionnaire

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

Name of Scheme **CARLTON JAMES RETIREMENT FUND**
 Name of Company/
 Employer creating the Scheme **CARLTON JAMES PRIVATE & COMMERCIAL LTD**
 Serving Address for
 Pension Correspondence **UNIT 4**
CLEARWATER BUSINESS PARK
FRANKLAND ROAD
SWINDON, SN5 8Y2
 Telephone Number **0800 233 56 26**
 Contact Name **ROBERT HOLMES / SIMON CALTON**
 Email Address **ADAM @ PRIVATE - COMMERCIAL.COM**

Accountant Details

Name of the Company **NIGEL B BUTLER LIMITED**
 Contact Name **↙ 01793 852121**
 Telephone Number **NIGEL BUTLER / NIGEL BAGLEY**
 Email Address **POST @ NIGELBUTLER.CO.UK**
 Address **INTEGER HOUSE, COPEL HALL BUSINESS PARK**
WOOTTON BASSETT, WILTSHIRE, SN4 8DP

Financial Advisor Details

Name of the Company **SAN INVESTMENT MARKETING**
 Contact Name **SAN PIETRUSZKA**
 Telephone Number **01793 811126**
 Email Address **ADMIN @ SAN - CASH.CO.UK**
 Address **105 VICTORIA ROAD**
OLD TOWN, SWINDON
SN1 3BD

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

Trustees

PLEASE FULLY COMPLETE THIS SECTION AS INDICATED

Trustee 1 Title (Mr, Miss, Mrs)

MR

Forename(s)

ROBERT

Surname

HOLMES

Date of Birth

15-10-1958

Proposed Retirement Date

75

National Insurance Number

WE 04 84 38B

Home Address

17 BERANBURH FIELD
WROUGHTON
SWINDON
SN4 0QL

Is this Trustee also a Member?

☒ Yes ☐ No

Trustee 2 Title (Mr, Miss, Mrs)

MR

Forename(s)

SIMON

Surname

CALTON

Date of Birth

05-04-1980

Proposed Retirement Date

75

National Insurance Number

SM 96 99 38C

Home Address

67 BRITTEN ROAD
SWINDON
SN2S 2HQ

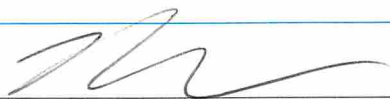
Is this Trustee also a Member?

☐ 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

05/08/2014



05-08-2014