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| Client Name/s | Neil DowkerSandra DowkerAdam DowkerLaura Hancock |
| Scheme Name | Country Fresh Foods SSAS |
| What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution | Various existing pensions |
| What are the Transfer values/contribution amount | Total expected transfer in from all members £158,687.31 |
| What percentage of customers funds are going into non standard investments | None |
| Investment Selection with approximate amounts allocated per selection | Commercial Property – 90%Cash – 10% |
| The number of people employed by the scheme establisher | 50+ |
| Current employment status | Employed |
| The corporation Tax reference of the employer The VAT registration number of the employer PAYE reference | 623 97250 13418 A23533856919673/H2151 |
| Is the proposed Limited Company currently active | Yes, company number 02408230 |
| Financial Adviser Involved  | David Thompson – TAG Wealth Management |
| If no Financial Adviser – explanation why  | N/A |
| Classification of Client | Retail |
| Any web based material; | N/A |
| Introducers | N/A |
| Details of investments  | Commercial Property |
| Explanation as to why customer is setting up a SSAS | To provide retirement benefits for the company directors |