SSAS SET UP INFORMATION

Client Name/s	Terence Hanrahan
Scheme Name	Hanrahan Developments pension scheme
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	'Val of white Horse D.C' (Oxfordshire county council)
What are the Transfer values/contribution amount	£351,000
What percentage of customers funds are going into non standard investments	50% UIS (alternative investments)
Details of the investments the client (trustees) are considering	Skywatch Inn Ltd 50% company loan
The number of people employed by the scheme establisher	0
The corporation Tax reference of the employer The VAT registration number of the employer PAYE reference	455 32778 20391 A
Current employment status	Self-employed
Is the proposed Limited Company currently active	Yes
Financial Adviser Involved	JAN Investment Marketing
If no Financial Adviser – explanation why	
Classification of Client	Certified High net worth
Explanation as to why customer is setting up a SSAS	To progress investment strategies into AIM and possibly employer related loan for developments as clients nature of business is buying and retaining investment properties.