

SSAS SET UP INFORMATION

Client Name/s	Jonathan Hydon
Scheme Name	Hydon & Grim Ltd Retirement Fund
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	Armed Forces Pension Scheme.
What are the Transfer values/contribution amount	£37,630.99
What percentage of customers funds are going into non standard investments	50%
Details of the investments the client (trustees) are considering	Skywatch Inn Ltd
The number of people employed by the scheme establisher	0
The corporation Tax reference of the employer	3234215756
The VAT registration number of the employer	
PAYE reference	
Current employment status	Director
Is the proposed Limited Company currently active	Active
Financial Adviser Involved	JAN Investment Marketing
If no Financial Adviser – explanation why	
Classification of Client	High net worth
Explanation as to why customer is setting up a SSAS	To progress investment strategies into AIM and possibly employer related loan. Other Pension provisions already in place for all directors.