

SSAS Takeover questionnaire

Name of Scheme **ISTRAT LTD SSAS PENSION SCHEME**

Name of Company/
Employer creating the Scheme **ISTRAT LTD**

Serving Address for
Pension Correspondence **STANDARD LIFE**

SSAS TEAM, LIFE EVENTS

DUNDAS HOUSE, 20 BRANDON STREET

EDINBURGH

Telephone Number **0131 274 8609**

Contact Name **EVAN LYNCH**

Email Address **SSAS_UNIT@STANDARDLIFE.COM**

HMRC and The Pensions Regulator

HMRC Pension Scheme
Tax Reference (PSTR) **00566788RP**

Government Gateway User ID

Password

The Pensions Regulator
Scheme Reference (PSR) **009/106700**

Scheme Key

Accountant Details

Name of the Company **RICHARD SNEDLEY ACCOUNTANTS**

Contact Name **RICHARD SNEDLEY**

Telephone Number **0113 258 2221**

Email Address **Richard.snedley@richard-snedley.co.uk**

Address **OAKFORD HOUSE**

291 LOW LANE HORSFORTH LEEDS

LS18 5NU

SSAS Takeover questionnaire

Financial Advisor Details

Name of the Company TAG WEALTH MANAGEMENT
Contact Name PAUL ROBERTSON
Telephone Number 07772 756114
Email Address PROBERTSON@TAG.UK.GM
Address RIVERDALE, 89 GRAYSON ROAD
SHEFFIELD S10 3QP.

Current Administrator / Professional Trustee Details (outgoing trustee)

Name of the Company STANDARD LIFE
Contact Name Fiona
Telephone Number 0345 606008
Email Address SSAS_UK@STANDARDLIFE.GM
Address 30 COATHIAN ROAD
EDINBURGH EH1 2DH

Continuing Trustees

Trustee 1 Title (Mr, Miss, Mrs) MR Forename(s) PAUL
Surname HAQUE Date of Birth 06 March 1968
Proposed Retirement Date 06 March 2043 National Insurance Number NP825071D
Home Address 20 THE MEADOWS
TODWICK
SHEFFIELD S26 1JG.

Is this Trustee also a Member?

☒ Yes ☐ No

SSAS Takeover questionnaire**Trustee 2** Title (Mr, Miss, Mrs)

Forename(s)

Surname

Date of Birth

Proposed Retirement Date

National Insurance Number

Home Address

Is this Trustee also a Member?

☐ Yes ☐ No**Trustee 3** Title (Mr, Miss, Mrs)

Forename(s)

Surname

Date of Birth

Proposed Retirement Date

National Insurance Number

Home Address

Is this Trustee also a Member?

☐ Yes ☐ No**Trustee 4** Title (Mr, Miss, Mrs)

Forename(s)

Surname

Date of Birth

Proposed Retirement Date

National Insurance Number

Home Address

Is this Trustee also a Member?

☐ Yes ☐ No

SSAS Takeover questionnairePension Practitioner . Com
Daws House
33-35 Daws Lane
London
NW7 4SD**Trustee 5** Title (Mr, Miss, Mrs)

Forename(s)

Surname

Date of Birth

Proposed Retirement Date

National Insurance Number

Home Address

Is this Trustee also a Member?

☐ Yes ☐ No**Trustee 6** Title (Mr, Miss, Mrs)

Forename(s)

Surname

Date of Birth

Proposed Retirement Date

National Insurance Number

Home Address

Is this Trustee also a Member?

☐ Yes ☐ No**When returning this form we require the following:**

- A copy of the original Trust Deed and Rules and all subsequent amendment Deeds.
- Most recent scheme accounts

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



Signed

Name

PAUL HAGUE

Name

Date

28.8.2017

Date