

SSAS SET UP INFORMATION

Client Name/s	Peter and Julie Wordley
Scheme Name	JPC Pension Fund.
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	Currently members of NGI 1 Retirement Scheme
What are the Transfer values/contribution amount	£220,000.00
What percentage of customers funds are going into non standard investments	50%.
Details of the investments the client (trustees) are considering	Skywatch Inn Ltd Godspiths
The number of people employed by the scheme establisher	
The corporation Tax reference of the employer	8756149646
The VAT registration number of the employer	63 9560 708
PAYE reference	
Current employment status	Directors
Is the proposed Limited Company currently active	Yes
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.