John Bhandal

Pension Scheme Services  
Fitz Roy House

Castle Meadow Road   
Nottingham

NG2 1BD Date: 16 June 2014

Dear Mr Bhandal,

Joe Bloggs Property Limited SSAS  
00812769RS

Thank you for your information notice in relation to the above application. I confirm and where relevant, enclose the following items which have been numbered for your reference:

1. Scheme rules. The scheme rules have been reviewed by your Office and they are model standard rules, which do not permit the access of relevant benefits to any member or any other persons before age 55, other than in accordance with your requirements. There are no executed amendments to the scheme rules.
2. Trust deed; this has been prepared by White & Co Solicitors in line with the scheme rules. There are no executed amendments to the trust deed.
3. The bank account has not been applied for yet as the scheme has not officially been tax registered. The bank will not open an account until this is confirmed. The client is unable to move funds without our consent and we cannot be removed from the account without our consent.
4. The scheme is intended to be a SSAS. The member details are as follows:

Full Name: Neil William Graham

Address: The Old Post House, Burford Road, Black Bourton, Bampton, Oxfodshire, OX18 2PF

Tel no: 01993358620 / 07802 300508

NI Number: WM390463A

1. We expect there to be a maximum of one members. It is only open to employees of the firm.
2. Our SSAS is targeted to small business owners and full information is available on our website, none of which promotes directly or indirectly pensions liberation.
3. The Trustees are hoping to make a 50% employer related loan which will be secured against a commercial property that is an unencumbered address. The rest of the fund will be going into regulated Investments and they have appointed Jan Investments Marketing to give the regulated advice. FCA No: 402391.
4. The projected fund value at the end of the first year is dependent on the eventual transfer value, capital appreciation of the return on investments. Each member receives a statutory money purchase illustration on their annual member of the scheme.
5. The scheme establisher is the sponsoring employer and is not a dormant company. The company details are detailed on the trust deed, together with CRO number. The corporation Tax Reference number is 4553826827855

And the client’s telephone number is 01993358620

1. Please see employer information below:

Company Name: Joe Bloggs Property Ltd

Address: The Old Post Housem Burford Road, Black Bourton, Bampton, Oxfodshire, OX18 2PF

Tel: 01993358620

Number of employees within the sponsoring employer: 1

1. The scheme is a SSAS.
2. The parties to this are our firm and the trustee has appointed the regulated firm Jan Investment Marketing FCA No: 402391 regarding the Investments.

To confirm:

This scheme is a direct case, the trustee wishes to make an employer related loan and the Investments selected will be subject to regulated advice. The member cannot access the assets of the scheme and the employer is not a dormant company. The member is a director of the Company for this scheme.

Yours faithfully

Michelle Lunnon

**For Pension Practitioner .Com Limited**

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