

SSAS Set up questionnaire

Telephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com

Name of Scheme **K2H RETIREMENT SCHEME**

Name of Company/
Employer creating the Scheme **KEYS 2 HOMES LTD**

Serving Address for
Pension Correspondence **21 BARLOW CLOSE**

WHEATLEY

OXFORD

OX33 1NL

Telephone Number **07940 412615**

Contact Name **WILLIAM FINLAY**

Email Address **williamdfinlay@aol.com**

Accountant Details

Name of the Company **ARIES ACCOUNTANTS**

Contact Name **ROB MCCULLOCH**

Telephone Number **01865 361457**

Email Address **rob@aries-accountants.co.uk**

Address **11 BOUNDARY BUSINESS PARK**

WHEATLEY ROAD

GARSINGTON, OXFORD OX44 9EJ

Financial Advisor Details

Name of the Company **JAN Investment Marketing**

Contact Name **Adam Holmes**

Telephone Number **0800 233 5626**

Email Address **adam@private-commercial.com**

Address **Lime Kiln House**

Lime Kiln

Royal Wootton Bassett, SN4 7HF.

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Trustees

PLEASE FULLY COMPLETE THIS SECTION AS INDICATED

Trustee 1 Title (Mr, Miss, Mrs) Mr

Forename(s) William

Surname Finley

Date of Birth 1814161

Proposed Retirement Date

National Insurance Number WL 277405 D

Home Address 21 Barlow Close
Wheatley
Oxford
OX33 1NL

Is this Trustee also a Member?

☒ Yes ☐ No

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

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

William D. Finley

Date

21/4/16