

SSAS SET UP INFORMATION

Client Name/s	ROSALIND ALTMANN PAUL RICHER
Scheme Name	LEO 1929 SSAS
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	2x LIBERTY SIPP
What are the Transfer values/contribution amount	TBC
What percentage of customers funds are going into non standard investments	0%
Investment Selection with approximate amounts allocated per selection	PROPERTY SHARE PORTFOLIO
The number of people employed by the scheme establisher	
Current employment status	
The corporation Tax reference of the employer The VAT registration number of the employer PAYE reference	
Is the proposed Limited Company currently active	YES
Financial Adviser Involved	DAVID THOMPSON TAG WEALTH MANAGEMENT
If no Financial Adviser – explanation why	—
Classification of Client	Professional
Any web based material;	— WWW.ROSALTMANN.COM
Introducers	—
Details of investments	See above
Explanation as to why customer is setting up a SSAS	To provide retirement savings for the scheme members.