

SSAS SET UP INFORMATION

Client Name/s	DEAN BUDER
Scheme Name	NAI Alpha Business Scheme.
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	Company contributions. or member transfer.
What are the Transfer values/contribution amount	upto £200K initially.
What percentage of customers funds are going into non standard investments	upto 45%.
Details of the investments the client (trustees) are considering	Skywatch Inn Ltd the spikes.
The number of people employed by the scheme establisher	3
The corporation Tax reference of the employer	9922229868A
The VAT registration number of the employer	
PAYE reference	120 PT 00685742
Current employment status	Director.
Is the proposed Limited Company currently active	YES
Financial Adviser Involved	JAN Investment Marketing
If no Financial Adviser – explanation why	
Classification of Client	#NWI.
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.