

## SSAS SET UP INFORMATION

Client Name/s	NEIL RYDER .
Scheme Name	NACI Future Pension Scheme .
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	Company contributions to member transfer
What are the Transfer values/contribution amount	up to £140K of company contributions .
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 Hedgepits .
The number of people employed by the scheme establisher	1.
The corporation Tax reference of the employer The VAT registration number of the employer PAYE reference	623 2928 19147A .
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	HNW I ,
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.

