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| --- | --- |
| Client Name/s | Graham Cartledge  Colin Cox |
| Scheme Name | Meller SSAS |
| What ceding schemes are the transfers coming from  If not transfers – source & explanation of contribution | No transfers at this time  Employer and Employee contributions, amounts to be decided |
| What are the Transfer values/contribution amount |  |
| What percentage of customers funds are going into non standard investments | 0% |
| Investment Selection with approximate amounts allocated per selection | To remain in cash until client decides, possible investment in commercial property |
| The number of people employed by the scheme establisher |  |
| Current employment status | Both members are directors of the sponsoring employer |
| The corporation Tax reference of the employer  The VAT registration number of the employer  PAYE reference | Corp Tax: 267PR00133117  VAT Registration No: 610 434 977  PAYE Reference No: 267/M7384 |
| Is the proposed Limited Company currently active | Yes |
| Financial Adviser Involved | Yes – David Thompson TAG Wealth Management |
| If no Financial Adviser – explanation why |  |
| Classification of Client | Retail |
| Any web based material; |  |
| Introducers | N/A |
| Details of investments | See above |
| Explanation as to why customer is setting up a SSAS | To provide retirement savings for the directors of the company. |