

SSAS Set up questionnaire

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

Name of Scheme

MELLER SSAS

Name of Company/
Employer creating the Scheme

MELLER LTD

Serving Address for
Pension Correspondence

LOCKINGTON HALL

LOCKINGTON

DERBY

DE74 2RH

Telephone Number

01509 67 0036

Contact Name

GRAHAM CARTLEDGE

Email Address

Accountant Details

Name of the Company

MAPLE BUSINESS ACCOUNTANTS

Contact Name

STEPHEN BAKER

Telephone Number

01332 207336

Email Address

stephenb@maple.ac.co.uk

Address

83 FRIAR GATE

DERBY

DE1 1FL

Financial Advisor Details

Name of the Company

TAG WEALTH MANAGEMENT

Contact Name

DAVID THOMPSON

Telephone Number

0114 2630888

Email Address

info@tag.uk.com

Address

RINGROSE, 89 GRAHAM ROAD

SHEFFIELD, S10 3GP

2 SSAS Set up questionnaire

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

Trustees

Trustee 1 Title (Mr, Miss, Mrs) Mr Forename(s) COLIN
 Surname COX Date of Birth 19/6/67
 Proposed Retirement Date _____ National Insurance Number NM 89 13 65 A
 Home Address 13 UGROVE AVENUE
WILFORD
NOTTINGHAM
NG11 7AE
 Is this Trustee also a Member? ☒ Yes ☐ No

Trustee 2 Title (Mr, Miss, Mrs) Mr Forename(s) GRAHAM
 Surname CARTLEDGE Date of Birth 16/7/55
 Proposed Retirement Date _____ National Insurance Number YY 80 74 660
 Home Address LOCKWOOD COTTAGE
WILLIS LANE
BELOAR
DE56 0LS
 Is this Trustee also a Member? ☒ Yes ☐ No

Trustee 3 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

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Trustee 4 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

Trustee 5 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

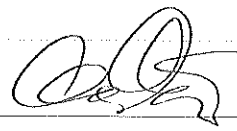
Please return this form to:
info@pensionpractitioner.com

Alternatively, post this form to:
Pension Practitioner .Com
Daws House
33-35 Daws Lane
London NW7 4SD

Signed

Date


11/3/15


11/3/15

