

SSAS SET UP INFORMATION

Client Name/s Members and Trustees	Heather Miller and Jason Miller
Scheme Name	Miller SSAS
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	Clerical Medical
What are the Transfer values/contribution amount	£12,000 and at a later date in specie Transfer and contribution
What percentage of customers funds are going into non standard investments, unconnected third party loans, loan note structures.	None
Details of the investments the client (trustees) are considering	No Investments under consideration at this time .
The number of people employed by the scheme establisher	1
The corporation Tax reference of the employer	6871539804887A
The VAT registration number of the employer	180815995
PAYE reference	475/JB04682
Current employment status	Director and Employed
Is the proposed Limited Company currently active	Yes 8864306 28 th January 2014
Financial Adviser Involved	No Adviser involved
If no Financial Adviser – explanation why	£12,000 Transfer Customer want to set up the SSAS structure only at this current time
Classification of Client Sophisticated High Net Worth Retail	Retail
Explanation as to why customer is setting up a SSAS	To facilitate an In specie transfer of commercial property with the consideration of making personal or company contributions
Names of introducers	None
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Details of web based material:	N/a