

SSAS Set up questionnaire

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

Name of Scheme Moorfield Garage Ltd Small Self Administered scheme

Name of Company/
Employer creating the Scheme Moorfield Garage Ltd

Serving Address for
Pension Correspondence Unit C Moorfield Industrial Estate Moorfield Road

Yeadon Leeds West Yorks. LS19 7BN

Telephone Number 0113 250 5444

Contact Name Paul Senior

Email Address service@moorfieldgarage.com

Accountant Details

Name of the Company Sheards Accountancy Ltd,

Contact Name Carolyn Atkinson

Telephone Number 01484 541155

Email Address carolyna@sheards.co.uk

Address Vernon House 40 New North Rd Huddersfield West Yorkshire HD1 5LS

Financial Advisor Details

Name of the Company Sheards Wealth Management Ltd

Contact Name Mark Stewart

Telephone Number 01484 448019

Email Address markstewart@sheards.co.uk

Address Vernon House 40 New North Rd Huddersfield West Yorkshire HD1 5LS

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

Trustees

Trustee 1 Title (Mr, Miss, Mrs) Mr

Forename(s) Paul Norman

Surname Senior

Date of Birth 21-Nov-1964

Proposed Retirement Date

National Insurance Number NE315935C

Home Address 68 Clarence Street Cleckheaton West Yorkshire BD19 5HJ

Is this Trustee also a Member?

☒ Yes ☐ No

Trustee 2 Title (Mr, Miss, Mrs) Mr

Forename(s) Kevin Patrick

Surname Campbell

Date of Birth 07-Nov-1962

Proposed Retirement Date

National Insurance Number NA691462B

Home Address 175 Street Lane Roundhay Leeds West Yorkshire LS8 1AA

Is this Trustee also a Member?

☒ Yes ☐ No

Trustee 3 Title (Mr, Miss, Mrs) Mr

Forename(s) Richard

Surname Hunt

Date of Birth 09-Jan-1969

Proposed Retirement Date

National Insurance Number NR612907B

Home Address 6 North Avenue Otley Leeds West Yorkshire LS21 1AJ

Is this Trustee also a Member?

☒ Yes ☐ No

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

Trustee 4 Title (Mr, Miss, Mrs) Mr

Forename(s) Martin Joseph

Surname Campbell

Date of Birth 28-Aug-1953

Proposed Retirement Date

National Insurance Number WL851679C

Home Address 7 Wigton Park Close Alwoodley Leeds West Yorkshire LS17 8UH

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 November 2014