

SSAS Set up questionnaire

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

Name of Scheme NORTH WEST MARBLE & GRANITE LIMITED R & DBS.

Name of Company/
Employer creating the Scheme NORTH WEST MARBLE & GRANITE LIMITED

Serving Address for
Pension Correspondence

EDENFIELD

47 ARMISTEAD WAY

CRANAGE CW4 8FE

Telephone Number 07867. 497465. / 0161. 945. 3856

Contact Name RICHARD WILLIAMS

Email Address RICHARD @ MANCHESTERMARBLE.CO.UK.

Accountant Details

Name of the Company WHY HACKER YOUNG MANCHESTER LLP.

Contact Name BRIAN LEYLAND

Telephone Number 0161-236. 6936.

Email Address

Address ST. JAMES BUILDING

79 OXFORD STREET

MANCHESTER M1 6HT

Financial Advisor Details

Name of the Company ALDERLEY ASSET MANAGEMENT LTD

Contact Name CHRIS BURGESS

Telephone Number 01625-585851

Email Address CHRIS @ AAML.INFO

Address 35A LONDON ROAD. ALDERLEY EDGE.

CHESHIRE SK9 7TT.

2 SSAS Set up questionnaire

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Trustees

Trustee 1 Title (Mr, Miss, Mrs)	MR	Forename(s)	RICHARD DAVID
Surname	WILLIAMS	Date of Birth	27.04.66
Proposed Retirement Date		National Insurance Number	NH.72.93.57.C
Home Address	EDENFIELD 47 ARMISTEAD WAY GRANAGE CW4 8FE		
Is this Trustee also a Member?		☒ Yes ☐ No	

Trustee 2 Title (Mr, Miss, Mrs)	MR	Forename(s)	MICHAEL
Surname	CONNETT	Date of Birth	22.03.52
Proposed Retirement Date		National Insurance Number	YP.76.85.92.D
Home Address	CROWTHORNE WITHER LANE HIGH LEGH KNUTSFORD WA16 0SF		
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

13. Contracts (Rights of Third Parties) Act 1999

Save in respect of death or personal injury, you will look only to us (and not to any individual engaged or employed by us including but without limitation to any partners or consultants or contractors) for redress if you consider that there has been any breach of these terms of business or any variation thereof which you agree should be confirmed in writing, or in relation to any cause of action arising out of any service that we provide to you. You also agree not to pursue any claims in contract, tort or for breach of statutory duty (including but not limited to negligence) against any individuals working for us in carrying out our obligation under these terms of business or in relation to any service we provide to you at any time, whether the individual is named expressly in any correspondence we send to you or not. You acknowledge that such individuals (including but without limitation to directors, employees and consultants) are entitled to enforce this term pursuant to the Contracts (Rights of Third Parties) Act 1999.

14. Scope of our services

We provide administration services to Trustees of Small Self Administered Schemes in order that they may perform their functions as Trustees.

We do not give advice on the suitability or otherwise of transferring pensions held in the UK or Overseas to Small Self Administered Schemes. You are recommended to speak to an Independent Financial Advisor who is authorised to give such advice prior to making any pension transfers. Where we are requested to sign on behalf of the Scheme Administrator a pension warranty form, we are signing on the sole basis that the receiving scheme is capable of receiving a pension transfer and not for any other purpose.

Whilst we provide documentation and we rely on our pension solicitor's documentation, we are not solicitors and therefore clients are recommended to obtain their own legal advice where appropriate regarding the documentation we supply to them.

Our guidance is based on information provided to us by HMRC, The Pensions Regulator and other bodies. You must satisfy yourself that the information we provide to you is correct and you accept that we have no liability where in good faith there are any omissions, errors, inconsistencies in respect of the information we provide to you.

We do not undertake any activities arising from or connection with:

- Receiving instructions from the trustees or members about the buying or selling of trust and or insurance investments and then instructing a broker or product provider to effect the transaction.
- We do not deal or enter into investment transactions concerning **securities** or **relevant investments** on behalf of the trustees.
- Nor do we handle claims on behalf of trustees.
- We do not arrange the appointment of a custodian on behalf of the trustees.
- We do not give investment advice or solicit investment products

Such activities are undertaken by the trustees for themselves or through the appointed advisor. We do not receive any payments for investments and policies that you arrange.

We do undertake all of the following:

- Maintaining records;
- Liaising with tax authorities;
- Arranging actuarial advice;
- Paying over contributions to a product provider or fund manager for investment in line with pre agreed instructions; and
- Paying out benefits under the instruction of the trustees
- HMRC and all other Regulatory reporting
- Give information regarding changes in HMRC and Regulatory practice
- Give information we consider from time to time appropriate to the trustees concerning the governance of the pension scheme.
- Provide through our appointed solicitors legal services to the trustees

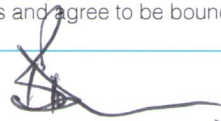
We do not hold nor are we a signatory to the assets of the pension scheme. We will hold authority for any investments undertaken in order that we may meet our reporting requirements to HMRC.

Fit and Proper Persons

We are registered with HM Revenue and Customs as a LLP Service Provider in order that we can meet their requirements of us. We have satisfied their fit and proper persons test and our certificate is available on request. We will share information with HMRC and their agencies to prevent fraud or in connection with the prevention of money laundering.

By signing this agreement you confirm that you have read the terms of business and agree to be bound by these terms of business.

Signed



Name

RICHARD WILLIAMS

Signed



Name

MICHAEL CONNETT

Signed

Name