

SSAS Set up questionnaire

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

Name of Scheme **Oakwood Clinic Pension Scheme**

Name of Company/
Employer creating the Scheme **Oakwood Clinic Ltd.**

Serving Address for
Pension Correspondence **32 Mosswood
Chippenden
BN14 0TN**

Telephone Number **01249 659566.**

Contact Name **Wulf Adams/Helen Adams**

Email Address **Drystone22@hotmail.co.uk**

Accountant Details

Name of the Company **Einstein Tax.**

Contact Name **Dan Derwood**

Telephone Number **07971 290925**

Email Address **dan@einstein.tax**

Address **59 Dubos Wood Avenue
Gerards Cross
SL9 7JY**

Financial Advisor Details

Name of the Company **JAN INVESTMENT MARKETING**

Contact Name **ROBERT HOLMES**

Telephone Number **07818007114 / 01793 61126**

Email Address **ADMIN@JAN-CASH.CO.UK**

Address **105 VICTORIA ROAD
OLD TOWN, SWINDON
SN1 3BD**

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 Mr	Forename(s)	Wilf
Surname	Adams	Date of Birth	7/1/1957.
Proposed Retirement Date	7/1/2029	National Insurance Number	Y211 3867A
Home Address	32 Mossmead Chippenham SN14 0TN		
Is this Trustee also a Member? ☒ Yes ☐ No			

Trustee 2 Title (Mr, Miss, Mrs)	Miss	Forename(s)	Heleen
Surname	Adams	Date of Birth	30/3/1959
Proposed Retirement Date	7/1/2029	National Insurance Number	WE17 08 51B.
Home Address	32 Mossmead Chippenham SN14 0TN		
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	18/09/16	18/09/16