

SSAS SET UP INFORMATION

Client Name/s	Witford Alan Adams.
Scheme Name	Clivic Oakmoor Pension Scheme.
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	See schedule.
What are the Transfer values/contribution amount	
What percentage of customers funds are going into non standard investments	90%.
Details of the investments the client (trustees) are considering	Skywatch Inn Ltd Hudspills.
The number of people employed by the scheme establisher	2
The corporation Tax reference of the employer	UTR 1268 41990
The VAT registration number of the employer	
PAYE reference	120/01/VA56461
Current employment status	
Is the proposed Limited Company currently active	YES
Financial Adviser Involved	JAN Investment Marketing
If no Financial Adviser – explanation why	
Classification of Client	Sophisticated
Explanation as to why customer is setting up a SSAS	To progress investment strategies into AIM and possibly employer related loan. Other Pension provisions already in place for all directors.