



F.A.O Emma Dane
Pension Practitioner
48 Chorley New Road
Bolton
BL1 4AP

17th April 2018

Dear Emma

Re: PLF Pension Fund

I refer to the above named Scheme and your recent E Mail, please find enclosed our original takeover questionnaire and look forward to receiving a reply to my letter dated 19th March 2018.

I would be grateful if you could return our original takeover questionnaire.

I trust you will find this letter to be in order and look forward to hearing from you as soon as possible. However, should you have any queries please do not hesitate to contact me.

Yours sincerely

A handwritten signature in black ink, appearing to read "Neil McLean", with a stylized flourish at the end.

Neil McLean

Tel: 0845 838 5670

Fax: 01482 217184

Email: neil.mclean@essentialpg.co.uk

1 Introduction

In order to allow Essential SSAS (Trustees) Limited to be appointed as the Professional Trustee and Essential SSAS Ltd the role of Scheme Administrator, please provide the following information and associated documentation that may be relevant.

Please note that making a false declaration on this application can have serious consequences.

2 Scheme Details

Name of Scheme	PLF Parsons Fund
Scheme/Policy Number	
PSTR Number	00816399RE
Number of Members	2

3 Principal Employer

Contact Name	PAUL FRANKS		
Company Name	INVESTMENT MANAGEMENT ENERGY (UK) LTD		
Registered Office	SUITE 2 - GROUND FLOOR, 9 WATERSIDE PARK HESSLE EAST YORKS Postcode HU13 0EG.		
Company Registered No		Email Address	PAUL.FRANKS@IM-ENERGY.CO.UK
Tel No			
Trading Address	AS ABOVE.		
		Postcode	
Tel No	07710 009 434	Email Address	
Employer Status (e.g. limited, partnership, etc)	LTD COMPANY	Employer Year End	
Nature of Business	ENERGY BROKERS		
Corporation Tax District / Reference		PAYE District/Reference	

4 Retiring Administrator

Scheme Administrator Name			
Company Name (if applicable)			
Address			
	Postcode		
Contact Name			
Tel No		Email Address	
Scheme Administrator ID	A		

Has the scheme been registered for HMRC on-line pension service? ☐ Yes ☐ No

5 Trustees

(Please include details of the current Professional Trustee).

Full Name

Address

Member

PAUL HANSEY FRANKS	39 ASTON HOUSE MAIN STREET BLOUGHTON BROUGH HU15 1JP	☒ Yes	☐ No
LINDA FRANKS		☒ Yes	☐ No
		☐ Yes	☐ No
		☐ Yes	☐ No
		☐ Yes	☐ No
		☐ Yes	☐ No

6 Scheme Bank Account Details

Are the account details

Existing Details

☒ Yes

☐ No

- SSB ATTACHED

New Account to be created?

☒ Yes

☐ No

RBS / 4

Please be aware some administrators will not allow the bank account to be transferred to a new scheme administrator.

Bank Account

Bank Address

Tel No

Contact Name

Signing Instructions

Postcode

Email Address

7 Current Assets

Type of Holding Company Policy No Value(£)

PROPERTY.			
BANK ACCT.			
INVESTMENTS			

8 Additional Information

RE THE INVESTMENTS - INFORMATION SPARSE AT PRESENT - TRUSTEES INTENTION IS TO ASK FINANCIAL ADVISORS ON TAKE OVER COMPLETE
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9 Professional Appointments

Independent Financial Adviser to Scheme

Company Name	TBA.		
Address			
	Postcode		
Tel No		Email Address	
Contact Name			
Regulated by		Authorisation Number	

Will the IFA be appointed to act as the Investment Adviser?

☐ Yes ☐ No

Do you wish your Financial Adviser to receive remuneration from your SSAS?

☐ Yes ☐ No

Remuneration	Initial (Set Up)	£	or	%
	Additional Funds	£	or	%
	Annual	£	or	%

Any annual fee must be submitted by an invoice

Accountant (Principal Employer)

Company Name			
Address			
	Postcode		
Tel No		Email Address	
Contact Name			

Additional Participating Employer

Is any employer, other than the principal employer, to participate in the SSAS?

☐ Yes ☒ No

If yes, please complete the following:-

Company Name				
Registered Office				
	Postcode			
Tel No		Email Address		
Trading address				
	Postcode			
Tel No		Email Address		
Employer Status (e.g. limited, partnership, etc)		Employer Year End		
Nature of Business				
Corporation Tax District/Reference		PAYE District/Reference		

10 Declaration

On behalf of the Principal Employer we agree to Essential SSAS (Trustees) Limited and Essential SSAS Limited investigating the takeover of the scheme. We understand that there will be a charge for this work and any additional work associated with the takeover of the scheme.

We confirm we are acting in accordance with the Memorandum and Articles of Association of the Company or Partnership Agreement.

We confirm that all of the data contained within this questionnaire is to the best of our knowledge accurate.

We agree to be bound by the Trust Deed and Rules of the Scheme as amended from time to time.

Essential SSAS (Trustees) Limited and Essential SSAS Limited have been formally appointed as Professional Trustee and Administrator, respectively, to the scheme.

We accept the Essential SSAS Limited fees (as amended from time to time) and that they will be invoiced as appropriate. Essential SSAS Limited reserve the right to deduct fees directly from the scheme bank account.

Signed for and on behalf of the Principal Employer

Name	PAUL FRANKS	Position	Director
Signature	P. Franks	Date	07/03/18

Members Signatures (All members must sign here).

Name	PAUL FRANKS	Position	Trustee
Signature	P. Franks	Date	07/03/18

Name	LINDA FRANKS	Position	Trustee
Signature	L. Franks	Date	07/03/18

Name		Position	
Signature		Date	

Name		Position	
Signature		Date	



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