

PAIE 120 / ZA83264
Corporation S32+76776-18295 A02
VAT Number 173 3860 96.



SSAS Set up questionnaire

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

Name of Scheme ~~Investment Manag.~~ PIF Pension Fund;
Name of Company/
Employer creating the Scheme ~~Investment~~ Management (UK) Limited
Serving Address for
Pension Correspondence 39. Main Street
Kilgorton
Leeds
HU15 1JP
Telephone Number 01482 669667
Contact Name Paul Franks
Email Address paul.franks@im-energy.co.uk

Accountant Details

Name of the Company CBA Langate Beverley
Contact Name CHRIS BROWN
Telephone Number 01482 881919
Email Address
Address A Yorks 72 Langate Beverley
North Humberside HU17 8EU

Financial Advisor Details

Name of the Company Keith Long Target Financial
Contact Name Keith Long
Telephone Number 07949 071072
Email Address keith.long@btopenworld.com
Address 137 Shipman Road
Market Weighton
York YO43 3RA FCA - 410506

2 SSAS Set up questionnaire

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

Trustees

Trustee 1 Title (Mr, Miss, Mrs)

Forename(s)

Surname

Proposed Retirement Date

Home Address

Date of Birth

National Insurance Number

Paul. Henery
franks
1709 1954
YY 7083 27E
39 Main Street
Elkington East Yorks HU15 1JP

Is this Trustee also a Member?

☒ Yes ☐ No

Trustee 2 Title (Mr, Miss, Mrs)

Forename(s)

Surname

Proposed Retirement Date

Home Address

Date of Birth

National Insurance Number

LINDA
franks
65
2909 52
YS 9794 95C
39 Main Street
HU15 1JP
Elkington East Yorks

Is this Trustee also a Member?

☒ Yes ☐ No

Trustee 3 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

3 SSAS Set up questionnaire

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

Trustee 4 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

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

P.H. Franks

Date

06/08/2014

pp P.H. Franks