

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

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

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

Date

P.H. Franks
06/08/2014
pp P.H. Franks