

## SSAS Set up questionnaire

Telephone: 0800 634 4862 Fax: 020 8711 2522 Email: [info@pensionpractitioner.com](mailto:info@pensionpractitioner.com)

Name of Scheme

Name of Company/  
Employer creating the Scheme

Serving Address for  
Pension Correspondence

Telephone Number

Contact Name

Email Address

## Accountant Details

Name of the Company

Contact Name

Telephone Number

Email Address

Address

## Financial Advisor Details

Name of the Company

Contact Name

Telephone Number

Email Address

Address

## 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 Forename(s) MARK JOSEPH  
Surname WHETTON Date of Birth 18/04/1962  
Proposed Retirement Date 65 National Insurance Number WP211800  
Home Address 29 PURLEIGH CLOSE  
BASILDON ESSEX  
SS13 1RJ

Is this Trustee also a Member?

☐ Yes ☐ No

**Trustee 2** Title (Mr, Miss, Mrs) \_\_\_\_\_ Forename(s) \_\_\_\_\_  
Surname \_\_\_\_\_ Date of Birth \_\_\_\_\_  
Proposed Retirement Date \_\_\_\_\_ National Insurance Number \_\_\_\_\_  
Home Address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

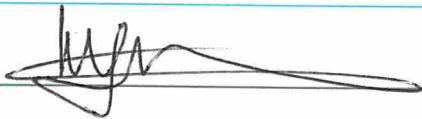
Is this Trustee also a Member?

☐ 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