

SSAS SET UP INFORMATION

Client Name/s	JAS BAINS
Scheme Name	RBC PENSION SCHEME
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	<ul style="list-style-type: none"> • Scottish Widows • Hartley SAS (BRISTOL)
What are the Transfer values/contribution amount	Approximately £100,000
What percentage of customers funds are going into non standard investments	
Investment Selection with approximate amounts allocated per selection	
The number of people employed by the scheme establisher	1
Current employment status	Business Manager
The corporation Tax reference of the employer	623 64079 05194 A
The VAT registration number of the employer	
PAYE reference	
Is the proposed Limited Company currently active	
Financial Adviser Involved	
If no Financial Adviser – explanation why	
Classification of Client	
Any web based material;	
Introducers	
Details of investments	
Explanation as to why customer is setting up a SSAS	