

SSAS Set up questionnaire

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

Name of Scheme Roeland Securities Pension Scheme

Name of Company/
Employer creating the Scheme Roeland Securities Ltd.

Serving Address for
Pension Correspondence 1 Church Steps
Martley
Worcester WR6 6QA.

Telephone Number 01886 889200.

Contact Name Jonathan Wheeler

Email Address jonathanwheeler10@gmail.com.

Accountant Details

Name of the Company

Contact Name

Telephone Number

Email Address

Address

Financial Advisor Details

Broker Details:

Name of the Company Cartan James Private & Commercial

Contact Name Robert Holmes

Telephone Number 0800 233 5626

Email Address Robert@Private-commercial.com, Info@private-commercial.com

Address Unit 4, Clearwater Business Park, Frankland
Road, Swindon, SN5 8YZ

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) Jonathan Julian
Surname Wheeler Date of Birth 21/2/1978
Proposed Retirement Date 21/2/2035 National Insurance Number U217 33 92 B
Home Address 1 Church Steps
Martley
Worcester WR6 6QA
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

23/12/13.