

SSAS SET UP INFORMATION

Client Name/s	Nick Passmore
Scheme Name	SCTL Pension Scheme
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	Hargreaves Lansdown SIPP
What are the Transfer values/contribution amount	£45,000
What percentage of customers funds are going into non standard investments	45%.
Investment Selection with approximate amounts allocated per selection	SKYNATCH Dolphin Trust Strategic Placements - Woodsg.
The number of people employed by the scheme establisher	11
Current employment status	Self Employed.
The corporation Tax reference of the employer The VAT registration number of the employer PAYE reference	2232900399 979929330 None
Is the proposed Limited Company currently active	Yes
Financial Adviser Involved	JAN Investment Marketing
If no Financial Adviser – explanation why	
Classification of Client	High Net Worth Individual
Any web based material;	WWW.PRIVATE-COMMERCIAL.COM
Introducers	CARLTON JAMES PRIVATE & COMMERCIAL.
Details of investments	
Explanation as to why customer is setting up a SSAS	REQUIRES MORE DIVERSE RANGE OF INVESTMENT SELECTION.