**Pension Pre-Application Form**

Could you kindly provide us with the following information so that we can prepare the documents establishing the pension scheme please?

1. What would you like to call the scheme (i.e. Sixteen Retail SSAS)
2. Copy of your passport -
3. Copy of your driving licence –
4. Home address, together with a proof of address (utility bill or a bank statement) and a confirmation of how long you have lived at this address (if less than 1 year, please provide a previous address). Also please advise which address would you like to use as a correspondence address.
5. NI number
6. Personal UTR number used for self-assessment
If you will not be the sole member trustee, points 2-6 apply to each trustee

7. Phone number and e-mail address.

|  |  |  |
| --- | --- | --- |
|  | Alex | Nicola |
| 1 | Harrington Haigh | Harrington Haigh |
| 2 | Attached  | Attached |
| 3 | Attached  | Attached |
| 4 | 89 Egerton Road South, Manchester, M21 0YH | 30 Broad Road, Sale, Manchester M33 2BN |
| 5 | JR 76 05 30 C | JR 46 07 94 C |
| 6 | 4361153097K | 1921150043 |
| 7 | 07737910932 alex@sixteenrealestate.com | 07971 183165nicola@sixteenrealesate.com |

Company Details

1. Corporation Tax Reference
2. Is the company registered for VAT? If so, please provide the VAT registration number.

3. Is the company registered for PAYE? If so, please provide the PAYE reference.

4. Number of people employed.
5. Company email address if different from your personal email address.
6. Company telephone number if different from your personal telephone number.

|  |  |
| --- | --- |
|  | Sixteen |
| 1 | 1702821755A00104A. |
| 2 | 269 6254 63 |
| 3 | 475/RB65938 |
| 4 | 1 (plus Alex and Nicola) |
| 5 | Same as personal  |
| 6 | 0161 461 1616 |

Details of the remaining company directors (HMRC require details of all company directors to tax register the scheme even if they are not supposed to be the trustees)
This would only be applicable if other directors in Sixteen Real Estate – Retail (which I don’t think there are)

1. Name
2. Home address and a confirmation of how long they have lived at this address (if less than 1 year, please provide a previous address).
3. Date of birth
4. NI number
5. Personal UTR number used for self assessment
6. Phone Number
7. E-mail address

Accountant Details

1.  If you have an accountant, please provide their contact details

Adrian Phillips (FCA)

adrian@arloaccountancy.co.uk

07807 390 618

[www.arloaccountancy.co.uk](http://www.arloaccountancy.co.uk/)

Arlo Accountancy Limited (Company number: 10997645)

Registered Address: 107 Valley Road, Heaton Mersey. Stockport, SK4 2DB