FAO Anthony Scammell

Old Mutual Wealth

Old Mutual House

Portland Terrace

Southampton

SO14 7AY

15th September 2017

Dear Mr Bhandal,

**St Johns Abingdon Limited Pension Scheme – 00821745RZ**

Further to your letter dated 30th August, please find enclosed and below the information you have requested for the above-named pension scheme.

1. Copy of the Scheme Rules are enclosed.
2. Copy of the Establishing Deed is enclosed, along with any amendments to that deed.
3. Bank Statements as requested.
4. The Scheme has 4 members, detailed below:

|  |  |
| --- | --- |
| **Full Name – 1** | Mr Paul Benjamin Beauchamp |
| Address | Grindle Cottage, Low Side, Calver, Hope Valley, S32 3XQ |
| Telephone number | 07771 565 432 |
| National insurance number | NM806984D |
| **Full Name – 2** | Mrs Josephine Beauchamp |
| Address | Grindle Cottage, Low Side, Calver, Hope Valley, S32 3XQ |
| Telephone number | 01433 639 333 |
| National insurance number | ND850542D |
| **Full Name – 3** | Mr John Martyn Beauchamp |
| Address | Pennine Cottage, Main Street, Calver, Hope Valley, S32 3XR |
| Telephone number | 07831 307 888 |
| National insurance number | YE397798C |
| **Full Name - 4** | Mrs Janette Elizabeth Beauchamp |
| Address | Pennine Cottage, Main Street, Calver, Hope Valley, S32 3XR |
| Telephone number | 01433 630 383 |
| National insurance number | YH082612A |

1. The Scheme was not marketed, nor is there a target membership. The scheme does not have any associated introducers. The members have an Independent Financial Adviser for their transfers. (See point 10 for the IFA details)
2. The scheme is not linked to any investment providers. The members are going to be purchasing commercial property through the scheme. This has already been started and is due to complete soon.
3. The Scheme was originally established by a sponsoring employer by the name of St Johns Abingdon Ltd (company number 09220259 of 32 St. Johns Road, Abingdon, Oxfordshire, OX14 2HB. The sponsoring employer was not trading at this time and as such had not applied for a VAT or PAYE number. The corporation tax number was being awaited from the Company’s accountant. Since then the Scheme has removed this sponsoring employer and has instated a new principal and Participating employer. Pease see the details below:

|  |  |
| --- | --- |
| Employer Full Name | Power System Services Ltd |
| Address | Carrwood Road, Sheepbridge, Chesterfield S41 9QB |
| Telephone number | 01246 268 800 |
| Number of people employed | 40 |
| Registered for tax with HMRC | Yes |
| PAYE reference | 673/P3480 |
| VAT reference (If applicable) | 658046421 |
| Corporation tax reference | 6737356408 |
| Partnership tax reference | N/A |
| Self-assessment tax reference | N/A |

1. The scheme has received one transfer in the last 12 months. This was for Mr Paul Beauchamp (detailed in point 4) and totalled £241,155.51 from Friends Life. There are 3 further outstanding transfers for Mr Paul Beauchamp (Details in point 4). These are for an estimated £100,000.00.
2. The Financial Adviser involved is David Thompson of Tag Wealth Management, Riverdale, 89 Graham Road, Sheffield S10 3GP. Tel: 0114 263 2423.

The Scheme Administrators are ourselves (Details in the footer of this letter,) but Registered Scheme Administrators Limited, (Company no 09508411) at Vancouver House 111 Hagley Road, Edgbaston, Birmingham, England, B16 8LB are also on HMRC as Administrators. They do not look after the day to day running of the Scheme. This responsibility lies with Cranfords.

I trust this to be in order, however should you require any further information or have any questions, please do not hesitate to call 0844 410 0037 where a member of the SSAS team will be happy to help.

Yours Sincerely

***Emma Dane***

***Senior Pensions Administrator***