

# SSAS SET UP INFORMATION

Client Name/s	
Scheme Name	TITAN FUNDING TRUSTEE Scheme.
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	
What are the Transfer values/contribution amount	£75,000
What percentage of customers funds are going into non standard investments	
Details of the investments the client (trustees) are considering	Skywatch Inn Ltd 50% REGULATED 10% LOANS 40%.
The number of people employed by the scheme establisher	2
The corporation Tax reference of the employer	
The VAT registration number of the employer	
PAYE reference	
Current employment status	DIRECTOR
Is the proposed Limited Company currently active	YES.
Financial Adviser Involved	JAN Investment Marketing
If no Financial Adviser – explanation why	
Classification of Client	SUBSIDIARY
Explanation as to why customer is setting up a SSAS	To progress investment strategies into AIM and possibly employer related loan. Other Pension provisions already in place for all directors.