

Pension Practitioner

→ RECOMMENDED BY DARREN
HAWLEY @ GSI WEALTH MAN,

URGENT SSAS SETUP REQUIRED - CALL DARREN TO
DISCUSS.

SET UP QUESTIONNAIRE

Many thanks,

Name of Scheme:

Name of Company/Employer
creating the Scheme:

Serving Address for Scheme
Correspondence:

ROBERT GODDARD LTD.

6-8 BRIDGE STREET

WISBECH

PE13 1AF.

Telephone Number:

01945 583943 / 07736678888.

Contact Name:

OLIVER TOOKMAN

Email Address:

oliver@robertgoddard.co.uk.

Please provide details of your
Company/Business's accountant

Name of Accountant:

Address:

BULLEY DAVEY - FAO: MITCHELL
BURDEN

9/10 THE CRESCENT

WISBECH

PE13 1EH.

Telephone Number:

01945 464711.

Contact Name:

MITCHELL BURDEN

Please provide details of your
Financial Advisor

Name of Financial Advisor:

DARREN HAWLEY

Address:

GSI WEALTH MANAGEMENT LTD.

1 CHURCHILL COURT

HORTONS WAY, WESTERHAM, KENT
TN16 1BT.

Telephone Number:

01959 561500.

Contact Name:

DARREN HAWLEY

Trustees

Name of Trustee 1:

PAUL TOOKMAN

Date of Birth:

05/03/1958.

National Insurance Number:

Home Address:

15 SHEPHERDS ROAD

WATFORD

WD18 7HU.

Is this Trustee also a Member?

YN

Name of Trustee 2:

~~ANNA~~ ANNA TOOKMAN

Date of Birth:

29/04/1960.

National Insurance Number:

Home Address:

15 SHEPHERDS ROAD

WATFORD

WD18 7HU

Is this Trustee also a Member?

☒ Y ☐ N

Name of Trustee 3:

Date of Birth:

National Insurance Number:

Home Address:

Is this Trustee also a Member?

Y/N

7

Name of Trustee 4:

Date of Birth:

National Insurance Number:

Home Address:

Is this Trustee also a Member?

Y/N

7

Name of Trustee 5:

Date of Birth:

National Insurance Number:

Home Address:

Is this Trustee also a Member?

Y/N

Register with Pensions Regulator: Y/N (Pension Practitioner .Com to complete)

Administration Team Requirements: _____

Please return this form to:

info@pensionpractitioner.com

Alternatively, post this form to:

Pension Practitioner .Com Limited
Daws House
33-35 Daws Lane
London
NW7 4SD

Fax: 020 8711 2522
Phone: 0800 634 4862

Signed:

 _____

Date:

29/12/2010

Such activities are undertaken by the trustees for themselves or through the appointed advisor. We do not receive any payments for investments and policies that you arrange.

We do undertake all of the following:

- maintaining records;
- liaising with tax authorities;
- arranging actuarial advice;
- paying over contributions to a product provider or fund manager for investment in line with pre-agreed instructions; and
- paying out benefits under the instruction of the trustees
HMRC and all other Regulatory reporting
- Give information regarding changes in HMRC and Regulatory practice
- Give information we consider from time to time appropriate to the trustees concerning the governance of the pension scheme.
- Provide through our appointed solicitors legal services to the trustees

We do not hold nor are we a signatory to the assets of the pension scheme. We will hold authority for any investments undertaken in order that we may meet our reporting requirements to HMRC.

Fit and Proper Persons

We are registered with HM Revenue and Customs as a Company Service Provider in order that we can meet their requirements of us. We have satisfied their fit and proper persons test and a company of our certificate is available on request. We will share information with HMRC and their agencies to prevent fraud or in connection with the prevention of money laundering.

By signing this agreement you confirm that you have read the terms of business and agree to be bound by these terms of business.

Signed:.....

Name: O. TOOKMAN

Signed:.....

Name:.....

Signed:.....

Name:.....