

## SSAS Set up questionnaire

Telephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com

Name of Scheme **WADT PENSION FUND.**

Name of Company/  
Employer creating the Scheme **WADT LTD**

Serving Address for  
Pension Correspondence  
**49 Viceroy Road  
Swindon SN2 1JH**

Telephone Number **01793 846015**

Contact Name **PENNY BAILEY**

Email Address **pennybailey@yahoo.co.uk.**

### Accountant Details

Name of the Company **WATKINS & CO**

Contact Name **Paul Monk**

Telephone Number **01793 642577.**

Email Address

Address **1 Cricklade Court, Cricklade Street  
Swindon SN1 3EY**

### Financial Advisor Details

Name of the Company **SAN INVESTMENT MARKETING**

Contact Name **SAN PIETRUSZKA / ROBERT HOLMES**

Telephone Number **01793 61126 / 07818 007114**

Email Address **ROBERT@SAN-CASH.CO.UK / ADAM@ " " " "**

Address **105 VICTORIA ROAD  
OLD TOWN, SWINDON  
SN1 3BD**

**2 SSAS Set up questionnaire**

Telephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com

**Trustees**

PLEASE FULLY COMPLETE THIS SECTION AS INDICATED

|                                                                                                    |                                      |                           |                 |
|----------------------------------------------------------------------------------------------------|--------------------------------------|---------------------------|-----------------|
| <b>Trustee 1</b> Title (Mr, Miss, Mrs)                                                             | MR.                                  | Forename(s)               | Nicholas Donald |
| Surname                                                                                            | Bailey                               | Date of Birth             | 31/01/1968      |
| Proposed Retirement Date                                                                           | 01/10/2038                           | National Insurance Number |                 |
| Home Address                                                                                       | 49 Vicarage Road<br>Swindon SN2 1JH. |                           |                 |
| Is this Trustee also a Member? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |                                      |                           |                 |

|                                                                                                    |                                       |                           |               |
|----------------------------------------------------------------------------------------------------|---------------------------------------|---------------------------|---------------|
| <b>Trustee 2</b> Title (Mr, Miss, Mrs)                                                             | Mrs.                                  | Forename(s)               | Pendope Jane  |
| Surname                                                                                            | Bailey                                | Date of Birth             | 01/10/1968    |
| Proposed Retirement Date                                                                           | 01/10/2038                            | National Insurance Number | NR 25 21 76 D |
| Home Address                                                                                       | 49 Vicarage Road.<br>Swindon SN2 1JH. |                           |               |
| Is this Trustee also a Member? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |                                       |                           |               |

Please return this form to:  
info@pensionpractitioner.com

Alternatively, post this form to:  
Pension Practitioner .Com  
Daws House  
33-35 Daws Lane  
London NW7 4SD

Signed

*Eg Bailey N Bailey*

Date