

SSAS SET UP INFORMATION

Client Name/s	Roger Bartrim & Carl Rodgers
Scheme Name	Wilson Bros SSAS
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	SIPP
What are the Transfer values/contribution amount	
What percentage of customers funds are going into non standard investments	0%
Investment Selection with approximate amounts allocated per selection	To be Decided (Most likely commercial property)
The number of people employed by the scheme establisher	10
Current employment status	Employed
The corporation Tax reference of the employer The VAT registration number of the employer PAYE reference	7727009944 172896815 673/w7994
Is the proposed Limited Company currently active	Yes
Financial Adviser Involved	David Thompson
If no Financial Adviser – explanation why	
Classification of Client	Retail
Any web based material;	http://www.dustandfumeextractionsystems.co.uk/
Introducers	N/A
Details of investments	As above
Explanation as to why customer is setting up a SSAS	To provide retirement funds for the directors of Wilson Bros Ltd