

SSAS Set up questionnaireTelephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.comName of Scheme **Wilson Bros SSAS**Name of Company/
Employer creating the Scheme **Wilson Bros Ltd**Serving Address for
Pension Correspondence **35 Kirk Street****sheffield****S4 7JX**Telephone Number **0114 272 6179**Contact Name **Roger Bartrim**Email Address **sales@wilsonbros-sheffield.co.uk****Accountant Details**

Name of the Company

Contact Name

Telephone Number

Email Address

Address

Financial Advisor DetailsName of the Company **TAG Wealth Management**Contact Name **David Thompson**Telephone Number **0114 263 0888**Email Address **info@tag.uk.com**Address **Riverdale, 89 Graham Road****Sheffield****S10 3GP**

2 SSAS Set up questionnaireTelephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com**Trustees**

Trustee 1 Title (Mr, Miss, Mrs) Mr	Forename(s) Roger
Surname Bartrim	Date of Birth 27/07/1952
Proposed Retirement Date	National Insurance Number YS-69-21-11-A
Home Address 64 Main Road	
Holmesfield	
Sheffield	
S18 7WT	
Is this Trustee also a Member? <input type="checkbox"/> Yes <input type="checkbox"/> No	

Trustee 2 Title (Mr, Miss, Mrs) Mr	Forename(s) Carl Alexander
Surname Rogers	Date of Birth
Proposed Retirement Date	National Insurance Number
Home Address 11 Matthews Fold	
Sheffield	
South Yorkshire	
S8 8JT	
Is this Trustee also a Member? <input 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

Date