

## SSAS SET UP INFORMATION

Client Name/s	ANDREW + JOANNE WHITEMORE
Scheme Name	WHITEMORE SSAS RETIREMENT SCHEME
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	JAMES HAY SIP 32722
What are the Transfer values/contribution amount	
What percentage of customers funds are going into non standard investments	
Investment Selection with approximate amounts allocated per selection	
The number of people employed by the scheme establisher	5
Current employment status	(ANDREW) (MANAGING DIRECTOR) (JOANNE) (DIRECTOR)
The corporation Tax reference of the employer	5989001244A00112A
The VAT registration number of the employer	422 9837 36
PAYE reference	794 BA406
Is the proposed Limited Company currently active	TRADING
Financial Adviser Involved	<del>SMART TRAVEL</del> NO
If no Financial Adviser – explanation why	N/A
Classification of Client	
Any web based material;	NO
Introducers	SMART TRAVEL
Details of investments	SHARE & BOND INVESTMENTS WITH VESTRA WEALTH
Explanation as to why customer is setting up a SSAS	TO ADHERE COMMERCIAL PROPERTY AS INVESTMENT