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0844 410 0037

Mr & Mrs Marriott
25 Highfield Road
Southport
PR9 8QL

8th October 2014

Application Pack for a new Small Self -Administered Scheme

Dear Anthony and Lisa

Thank you for choosing Cranfords as the Scheme Administrator for your new Pension Scheme.

This Pack includes the following:

1. Application Form
2. Administration Agreement x2
3. Trust Deed & Rules
4. SSAS Establishment authority letter
5. Member Information Form
6. Predator Leaflet and HMRC Liberation Update
7. SSAS Key Features & Member Booklet

Application Form

Scheme Details – Please confirm the proposed name of your pension scheme and complete your contact details – if we hold this information we will pre-complete this on your behalf. If there are any changes to the completed information please amend and initial the amendment.

Principal Employer Details – Please provide a copy of the Certificate of Incorporation – if we hold this information we will pre-complete this on your behalf.

Additional/Participating Employer Details – if you would like an additional employer to participate in the scheme please complete the details here. Leave blank if just the Principal Employer is to participate in the scheme.

Employer Declaration – please read the details of the declaration – the declaration should be signed by a Director of the Principal Employer.

Member Details – Please complete a separate sheet for each Member of the Scheme.

Member Declaration – please read the details of the declaration – a separate declaration should be signed by each Member Trustee.

Transfer Details – Please complete a separate sheet for each Member/Transfer required. If you are taking benefits from the policy you wish to transfer please answer yes to the question “Are you taking benefits from the arrangement” and then provide the details requested below.



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Nomination of Beneficiaries – Please complete a separate form for each Member confirming where to pay benefits in the event of your death. The nomination you make can be updated at any time by completing a new form.

Appointment of Financial Adviser – Please complete the details of your financial adviser here and also confirm any fees to be paid out of your scheme.

Fund Investments – Please advise here the proposed investments for the fund.

Administration Agreement - Two copies of the Administration Agreement are enclosed. Please sign both of these and arrange for your signature to be witnessed by an independent party (i.e. not a relative, partner or person living at the same address as you). Please return one copy of the Agreement and retain one for your records. Please do not date this document.

Trust Deed - This is to establish your Scheme. Please can you sign this document where indicated and arrange for your signature to be witnessed by an independent third party. The witness cannot be a relative, spouse, partner or anyone living at the same address as you.

Please do not date the deed at this stage, we will date the deed on its return and retain a copy for our files. The original deed will be returned you in due course for safekeeping.

SSAS Establishment authority letter – please complete, sign and return.

Once the enclosed documents are returned, we will apply for formal approval of your scheme with H M Revenue & Customs. Once this approval has been received we will proceed with the opening of the scheme bank account.

Member Information Form – please complete, sign and return.

Identity check – We complete an identification check electronically on your behalf. This identity check will be used to open the Scheme bank account. If we are unable to verify your identity online then we may require photo copies or original documentation from you. If we request original documents they will be returned to you by registered post.

It is important that you complete the enclosed paperwork as per the instructions, sign where indicated and return it to us in the envelope provided.

I must point out at this stage, that we at Cranfords will only allow clients to operate their pension funds within the spirit of the pension legislation. This means we will not facilitate any form of pension liberation activity or assist others to do so. Please read the enclosed leaflets for further information regarding this.

I look forward to receiving your application pack but if you have any questions, please don't hesitate to call me on 0844 410 0037. Our offices are open from 9am to 7pm Monday to Thursday and 9am to 3pm on Friday.

Yours sincerely,

Toni Haynes