

## SSAS SET UP INFORMATION

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| Client Name/s Members and Trustees   | AG TRADING (AULSHAM) LTD.  |
| Scheme Name  | AG TRADING (AULSHAM) LTD.  |
| What ceding schemes are the transfers coming from<br>If not transfers – source & explanation of contribution                           | LSPS<br>GOVERNMENT SCHEME  |
| What are the Transfer values/contribution amount   | £ 66,000 +   |
| What percentage of customers funds are going into<br>non standard investments, unconnected third party<br>loans, loan note structures. | None   |
| Details of the investments the client (trustees) are<br>considering  | To be advised.   |
| The number of people employed by the scheme<br>establisher   | None as yet.   |
| The corporation Tax reference of the employer<br>The VAT registration number of the employer<br>PAYE reference                         | Not registered as yet  |
| Current employment status  | unemployed at present  |
| Is the proposed Limited Company currently active   | will be from 2/2017  |
| Financial Adviser Involved   | Finbarr Kelly Finance  |
| If no Financial Adviser – explanation why  |  |
| Classification of Client<br>Sophisticated<br>High Net Worth<br>Retail  | Retail   |
| Explanation as to why customer is setting up a SSAS  | opening New Business may<br>use funds to invest within<br>business |
| Names of introducers   | finbarr kelly  |
| Details of web based material:   |  |