

SSAS SET UP INFORMATION

Client Name/s	TIMOTHY WOOD / A+C WOOD LIMITED .
Scheme Name	A+C WOOD PENSION SCHEME
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	SEE REVERSE .
What are the Transfer values/contribution amount	SEE REVERSE
What percentage of customers funds are going into non standard investments	NONE
Investment Selection with approximate amounts allocated per selection	LAND + BUILDINGS TO BE CONFIRMED .
The number of people employed by the scheme establisher	
Current employment status	E.
The corporation Tax reference of the employer The VAT registration number of the employer PAYE reference	
Is the proposed Limited Company currently active	YES
Financial Adviser Involved	YES .
If no Financial Adviser – explanation why	N/A .
Classification of Client	N/A .
Any web based material;	N/A .
Introducers	N/A .
Details of investments	TO BE CONFIRMED .
Explanation as to why customer is setting up a SSAS	TAX PLANNING .

HSBC GLOBAL EQUITY	£ 33,949.22
HSBC PERSONAL PENSION PLAN	£ 6,756.46
SUN LIFE FINANCIAL	£ 700.30
SUN LIFE FINANCIAL	£ 25,539.25

BACK DATED CONTRIBUTIONS ALL THREE MEMBERS @ £40,000 PA.