



ATB Fire Safety Ltd
4 Parc Castell-Y-Mynach,
Creigiau,
Cardiff,
CF15 9NU

Cranfords
48 Chorley New Road
Bolton
BL1 4AP

18th May 2018

Dear Sirs,

ATB Fire Safety Ltd -- Small Self-Administered Scheme application

We write to you on behalf of the above named entity to request that you establish a Small Self-Administered Scheme and administer the scheme on our behalf.

We enclose the completed application forms.

Yours faithfully,

Adrian Burns
Director
For and on behalf of ATB Fire Safety Ltd



Member Information Form



AMPS
ASSOCIATED MEMBER PENSION
SOCIETY

The Pensions Regulator has recently issued new guidance on making pension transfer payments which sets out a number of checks for us to perform before requesting or making transfer payments.

The checks are designed to ensure that your pension savings will be used for the purpose they were intended, to provide you with benefits in your retirement.

Both The Pensions Regulator and H M Revenue & Customs are concerned about the number of individuals who are enticed into pension scams, also known as pension liberation fraud. Many of these scams work by suggesting that they can provide individuals with early access to their pension savings, without explaining the significant tax consequences that are likely to arise as a result.

Please find enclosed a leaflet from The Pensions Regulator which provides guidance on how you can avoid becoming a victim of pension liberation fraud. A recent update from H M Revenue & Customs is also enclosed – you can find more information about the tax consequences of accessing your pension savings early at www.hmrc.gov.uk – search for pension liberation tax consequences.

In order to apply for your transfers into your new scheme we require this form to be completed, signed and returned.

Member Name

ADRIAN BURNS. *Adrian Burns*

National Insurance Number

WL 00 53 21 C

Date of Birth

1st FEBRUARY 1960

1. Have you received any promotional material or information about the receiving scheme?

YES SCHEME FULL KEY FEATURES + DUE DILIGENCE

2. Have you received a quotation or illustration of the benefits that would be provided for you in the receiving scheme in exchange for your transfer value?

NO AS THE SSAS PROVIDOR DOES NOT PROVIDE ILLUSTRATIONS. ADVISOR HAS PROVIDED ESTIMATES AS PART

3. How did you become aware of the receiving scheme?

OF HIS RESEARCH.

MY INDEPENDENT FINANCIAL ADVISOR

4. Were you offered advice from an Independent Financial Adviser in connection with transferring your pension benefits?

YES.

5. During the transfer process, has the receiving scheme contacted you with official documentation or has all communication been by email or telephone?

HAVE RECEIVED OFFICIAL WRITTEN DOCUMENTATION FROM SCHEME ADVISOR.

6. Have you felt unduly pressured by anyone to make a quick decision about transferring your pension?

NO HAVE BEEN EXTENDED FOR OVER 12 MONTHS.

7. As the receiving scheme is an Occupational Pension Scheme, are you employed by an employer that sponsors the scheme?

YES.

8. Will you be receiving any cash payment, bonus, commission or loan from the receiving scheme or its administrators as a result of transferring your benefits? If yes, please provide details of the payment you will receive.

NO.

9. Have you been advised that your transfer proceeds will be invested overseas?

NO

10. Will part or more of your transfer payment be used as a tax free cash lump sum?

NO

11. Is there any connection between your Scheme Administrator and the investment company you will be using?

NO

12. Have you been told you can access benefits before age 55?

NO

Declaration

I confirm that the information provided above in questions 1 - 12 is, to the best of my knowledge, accurate and complete.

I confirm that I have read and understood the Pensions Regulator leaflet "Predators Stalk your Pension" that was enclosed with this information form.

I understand that the trustees of the scheme can report the payment of my transfer value to the Pensions Regulator and/or Action Fraud

Print Name: ADRIAN BURNS

Signed: Adrian Burns

Date 23rd May 2018