

SSAS SET UP INFORMATION

Client Name/s Members and Trustees	CHRIS BULGESS CONCELA BULGESS.
Scheme Name	ADRIAN WEALTH MANAGEMENT RBS.
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	2 X ALLTRUST SIPP.
What are the Transfer values/contribution amount	APPROX 7K.
What percentage of customers funds are going into non standard investments, unconnected third party loans, loan note structures.	NO MORE THAN 20%
Details of the investments the client (trustees) are considering	CASH BUILD UP INITIALLY.
The number of people employed by the scheme establisher	2.
The corporation Tax reference of the employer	687 C 3350703884
The VAT registration number of the employer	OUTSIDE THE SCOPE
PAYE reference	NOT OPERATING.
Current employment status	EMPLOYED / DIRECTOR
Is the proposed Limited Company currently active	YES.
Financial Adviser Involved	YES
If no Financial Adviser – explanation why	
Classification of Client Sophisticated ✓ High Net Worth ✓ Retail	
Explanation as to why customer is setting up a SSAS	NEED EFFICIENT VEHICLE TO TAKE MAX CONTRIBUTIONS PER YEAR.