

SSAS Set up questionnaire

Telephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com

Name of Scheme **ANNETTE MORRIS PENSION SCHEME**
 Name of Company/
 Employer creating the Scheme **AJ MORRIS CONSULTING LTD**
 Serving Address for
 Pension Correspondence **54 LINTHURST HILL**
FURSEST HILL
LONDON SE23 1PY

Telephone Number **07737 826769**

Contact Name **ANNETTE MORRIS**

Email Address **annette.morris@sutton.gov.uk**

Accountant Details

Name of the Company **WALSHTAX LTD**

Contact Name **JENNY WALSH**

Telephone Number **01702 476800**

Email Address

Address **977 LONDON ROAD**
LEIGH-ON-SEA ESSEX SS9 3LB

Financial Advisor Details

Name of the Company

Contact Name

Telephone Number

Email Address

Address

ANNETTE MORRIS
HAS 1X PRESERVED
F.S. SCHEME.
APPROX 100K.
SCHEME DETAILS
TO FOLLOW VIA EMAIL
REGARDS STEVE.

2 SSAS Set up questionnaire

Telephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com

Trustees

Trustee 1 Title (Mr, Miss, Mrs)	MB	Forename(s)	ANNETT
Surname	MORRIS	Date of Birth	14/7/1961
Proposed Retirement Date	70	National Insurance Number	WL983000B
Home Address	54 LOWTHER HILL FOREST HILL LONDON SE23 1PY.		
Is this Trustee also a Member?		☒ Yes	☐ No

Trustee 2 Title (Mr, Miss, Mrs)	Forename(s)
Surname	Date of Birth
Proposed Retirement Date	National Insurance Number
Home Address	
Is this Trustee also a Member?	
☐ Yes	☐ No

Please return this form to:
info@pensionpractitioner.com

Alternatively, post this form to:
Pension Practitioner .Com
Daws House
33-35 Daws Lane
London NW7 4SD

Signed

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Date

5/8/13