HM Revenue and Customs

Pensions Schemes Services

BX9 1GH

Date: 04/08/2023

Dear Mr Bhandal,

**Bill Holdsworth SSAS**

**Your Ref: APSS530**

**SRN: S0000025607**

Thank you for your letter dated 13th July 2023. Please find below the requested information to assist with the registration of Bill Holdsworth SSAS.

1. Please find enclosed a copy of the scheme rules. I can confirm that there have been no executed amendments to the rules.
2. Please find enclosed a signed and dated copy of the Trust Deed establishing the scheme. There have been no amendments made to that deed.
3. As per the scheme rules attached previously.
4. The scheme has no bank account at present. The trustees will require evidence confirming that the scheme has been tax registered before an account can be opened.
5. The scheme is intended to have one member. Please see below the member details:

William Alexander Holdsworth

Address: 2 Coppin Hall Lane, Mirfield, WF14 0EL

NI Number: WK091880C

Phone Number: 07794263863

1. The scheme is being set up for the one member listed above, who is the director of the sponsoring employer. The scheme will not be marketed. There are no introducers involved.
2. The Trustee intends to consolidate his pension benefits and transfer his pensions currently held with different pension providers, the total amount of which is approximately £146,000. Once the transfers have been completed, the investments being considered are as follows:

- Circa 50% of the value of the fund will be used as a secured employer related loan to James Holdsworth & Brothers Group Limited. The Trustee anticipates that this will generate a return for the scheme of up to 10%.

- Balance of funds is to be used as investments into regulated stocks and shares with an estimated yield of between 3% - 4% in the first year.

1. The Trustee anticipates the scheme to be worth approximately between £153,000 - £155,000 at the end of the first year of its existence.
2. The scheme will not be offered for auto enrolment.
3. Employer adhered to the scheme:

Employer Full Name: James Holdsworth & Brothers Group Limited

Address: Unit 1 Holme Mills, West Slaithwaite Road Marsden, Huddersfield, West

Yorkshire, HD7 6LS

Phone Number: 07794263863

Number of people employed: 3

Registered for tax with HMRC: Yes

PAYE Ref: 072/XA21341

VAT Ref: 974965650

Corporation Tax Reference: 6239021320

Partnership Tax Reference: N/A

Self-assessment tax reference: N/A. Employer is not an individual.

1. N/A
2. Scheme Trustees:

William Alexander Holdsworth

Address: 2 Coppin Hall Lane, Mirfield, WF14 0EL

NI Number: WK091880C

Phone Number: 07794263863

Anne Holdsworth

Address: 2 Coppin Hall Lane, Mirfield, WF14 0EL

NI Number: WK729492B

Phone Number: 07792257218

Scheme Administrator:

RC Administration Limited

Company Number: 12409200  
Company Address: 1a Park Lane, Poynton, Stockport, England, SK12 1RD

Contact number:  0330 311 0839

Email: info@rcadministration.com  
Role: Registered Administrator

RC Administration Limited, which I am a director of, is a SSAS administration company.

I have performed scheme administration work for several years and I have the required pensions knowledge to act in this capacity. I am also registered as scheme administrator under ID number: A0150724.

Financial Adviser Details:

Mark Stewart

Wealth Management Partner - True Potential LLP

Company Address: True Potential Wealth Management, Vernon House, 40 New North Rd, Huddersfield, England, United Kingdom

Phone Number: 07590 357701, 01484 448019

Email Address: markstewart@tpllp.com

This is the only scheme we have been asked by the Trustees to set up.

Should you require any further information, please advise me accordingly.

Yours Sincerely,

David Nicklin (CERT PFS), Director

**For and on behalf of RC Administration Limited**

Enc.