

SSAS SET UP INFORMATION

Client Name/s	Rajni Patel
Scheme Name	Hydon and Grim Pension Scheme
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	BLUE NEON PENSION SCHEME ↓ Coming from Hydon & Grim Pension Scheme
What are the Transfer values/contribution amount	£ 207,563.94
What percentage of customers funds are going into non standard investments	40% non standards 10% regulated. 50% Preference Shares
Details of the investments the client (trustees) are considering	Skywatch Inn Ltd regulated bond products Hudspiths Preference Shares issue to SPV
The number of people employed by the scheme establisher	Director only.
The corporation Tax reference of the employer →	4572517447A0010SA
The VAT registration number of the employer →	170556117
PAYE reference	
Current employment status	Director
Is the proposed Limited Company currently active	Yes - Active for 8 years
Financial Adviser Involved	JAN Investment Marketing
If no Financial Adviser – explanation why	
Classification of Client	High Net Worth
Explanation as to why customer is setting up a SSAS	To progress investment strategies into AIM and possibly employer related loan. Other Pension provisions already in place for all directors.