

SSAS SET UP INFORMATION

Client Name/s	Kelli Salone
Scheme Name	DC Pension Scheme
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	Friends Life Prudential BMW
What are the Transfer values/contribution amount	£73,000
What percentage of customers funds are going into non standard investments	45%
Details of the investments the client (trustees) are considering	Skywatch Inn Ltd
The number of people employed by the scheme establisher	11
The corporation Tax reference of the employer The VAT registration number of the employer PAYE reference	161617616
Current employment status	Self employed
Is the proposed Limited Company currently active	Yes
Financial Adviser Involved	JAN Investment Marketing
If no Financial Adviser – explanation why	
Classification of Client	
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.