

SSAS SET UP INFORMATION

Client Name/s	Martin Webb
Scheme Name	Elliot James Pension Scheme
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	MGI Retirement Scheme ↳ will be an in-specie transfer
What are the Transfer values/contribution amount	£ 600,000.00
What percentage of customers funds are going into non standard investments	50%
Details of the investments the client (trustees) are considering	Skywatch Inn Ltd Huddersfield
The number of people employed by the scheme establisher	Ø
The corporation Tax reference of the employer	111 9541611909
The VAT registration number of the employer	N/A
PAYE reference	N/A
Current employment status	Director
Is the proposed Limited Company currently active	Yes
Financial Adviser Involved	JAN Investment Marketing
If no Financial Adviser – explanation why	
Classification of Client	Sophisticated Investor.
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.