

SSAS Takeover questionnaire

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

Name of Scheme *Elljess Investments Ltd Executive Pension Scheme*
Name of Company/
Employer creating the Scheme *Elljess Investments Ltd*
Serving Address for
Pension Correspondence *c/o Lucesco Ltd*
14 Kurzeland way, Sayers Common,
West Sussex BN6 9TB

Telephone Number *0845 073 0497*
Contact Name *Dawn Hutchings*
Email Address *dawn@lucesco.co.uk*

HMRC and The Pensions Regulator

HMRC Pension Scheme
Tax Reference (PSTR) *00822333RA*

Government Gateway User ID

Password

The Pensions Regulator
Scheme Reference (PSR)

Scheme Key

Accountant Details

Name of the Company *Dawn Benson Accountancy*
Contact Name *Dawn Benson*
Telephone Number *01273 833950*
Email Address *dawn@dawnbensonaccountancy.co.uk*
Address *Richmond House, 38 High Street,*
Hurstpierpoint, West Sussex BN6 9TB

2 SSAS Takeover questionnaire

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Financial Advisor Details

Name of the Company *Lucesco Ltd*
 Contact Name *Dawn Hutchings*
 Telephone Number *0845 073 0497*
 Email Address *dawn@lucesco.co.uk*
 Address *14 Furzeleaf Way, Sayers Common,
 West Sussex BN6 9TB*

Current Administrator / Professional Trustee Details (Outgoing Trustee)

Name of the Company *Rowanmoor Pensions*
 Contact Name *Nikita Pennell*
 Telephone Number *08445 440 581*
 Email Address *ssas@rowanmoor.co.uk*
 Address *Rowanmoor House, 46-50 Castle St,
 Salisbury SP1 3TS*

Continuing Trustees

Trustee 1 Title (Mr, Miss, Mrs) *Mr* Forename(s) *Geoffrey Owen*
 Surname *Jones* Date of Birth *19-09-63*
 Proposed Retirement Date *19-9-2023* National Insurance Number *NB 88 10 96 C*
 Home Address *Marchants Barn, Little Park Farm,
 Marchants Close, Hurstpierpoint,
 West Sussex BN6 9UZ*

Is this Trustee also a Member?

☒ Yes ☐ No

3 SSAS Takeover questionnaire

Telephone: 0800 694 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com

Trustee 2 Title (Mr, Miss, Mrs) *Mrs* Forename(s) *Lisa Jane*
Surname *Jones* Date of Birth *16-10-62*
Proposed Retirement Date *16-10-2017* National Insurance Number *NA 3739 20 B*
Home Address *Marchants Barn, Little Park Farm,*
Marchants Close, Hurstpierpoint,
West Sussex BN6 9UZ
Is this Trustee also a Member? ☒ Yes ☐ No

Trustee 3 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

Trustee 4 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

4 SSAS Takeover questionnaireTelephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com**Trustee 5** 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**Trustee 6** 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**When returning this form we require the following:**

- A copy of the original Trust Deed and Rules and all subsequent amendment Deeds.
- Most recent scheme accounts

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

Signed

Name

Geoffrey Jones

Name

Lisa Jones

Date

Date