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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 Furzeland way, Sayers Common,
West Sussex BN6 9JB

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 9JB

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

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 Furzeland Way, Sayers Common, West Sussex BN6 9JB

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

Telephone: 0800 634 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 37 39 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

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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 G.J.	Signed Lisa Jones
Name Geoffrey Jones	Name Lisa Jones
Date 17/09/15	Date 17.9.15