

# SSAS SET UP INFORMATION

Client Name/s	<del>Steve Hoole</del> Seamus Hoole + Tim Morgan-Hoole
Scheme Name	Fulshaw Gate SSAS
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	Old Mutual Personal Pension
What are the Transfer values/contribution amount	£1,521,764.22.
What percentage of customers funds are going into non standard investments	0%
Investment Selection with approximate amounts allocated per selection	Commercial property
The number of people employed by the scheme establisher	
Current employment status	Employed
The corporation Tax reference of the employer  The VAT registration number of the employer  PAYE reference	4633814515  072 A23
Is the proposed Limited Company currently active	Yes
Financial Adviser Involved	David Thompson
If no Financial Adviser – explanation why	
Classification of Client	Professional
Any web based material;	No
Introducers	N/A
Details of investments	See Above
Explanation as to why customer is setting up a SSAS	To provide retirement funds for the directors of the company