

HM Revenue and Customs  
Pensions Schemes Services  
BX9 1GH

Date: 02/09/2020

Dear Mr Bhandal,

**Joel 2 vs25-27 Pension Scheme**  
**Your Ref: APSS530**  
**SRN: S0000004161**

Thank you for your letter dated 22<sup>nd</sup> July 2020. Please find below the requested information to assist with the registration of Joel 2 vs25-27 Pension Scheme.

1. Please find enclosed a copy of the scheme rules. I can confirm that there have been no executed amendments to the rules.
2. Please find enclosed a signed and dated copy of the Trust Deed establishing the scheme. There have been no amendments made to that deed.
3. I can confirm there are no additional scheme administrators of the scheme.
4. Please find enclosed a copy of the resolution appointing RC Administration Limited to act as the Registered Administrator for the scheme.
5. The scheme has no bank account at present. The trustees will require evidence confirming that the scheme has been tax registered before an account can be opened.
6. There are less than 10 members, there will be 2 members, their details are as follows:  
Member 1:  
Full Name: Mrs Trisha Theodore-Heath  
Address: Flat 254 Berglen Court, 7 Branch Road, London E14 7JZ  
Telephone Number: 07872 944 352  
National Insurance Number: NZ676686C

Member 2:

Full Name: Mr. Stephen Heath

Address: Flat 254 Berglan Court, 7 Branch Road, London E14 7JZ

Telephone Number: 07592 715 434

National Insurance Number: WM287733A

7. The scheme is being set up for the 2 members listed in answer number 6. Trisha Theodore-Heath is the director of the sponsoring employer. The Trustees do not anticipate any more members joining the scheme. The scheme will not be marketed. There are no introducers involved.
8. The Scheme proposes to invest in commercial property, of which the Trustees both have existing knowledge. The Trustees are currently searching for a suitable commercial property. A business plan will be put in place once a specific deal has been agreed, which will be done once the scheme has been tax registered. A cash balance will be held in short term cash deposits.
9. The projected fund value at the end of the first year of the pension scheme's existence will depend upon whether a suitable commercial property has been sourced. Until then, an approximate fund value would be the cash in short term deposits of £200,000.00. The Trustees would be working towards an average of an 8 – 10% return on a yearly basis.
10. The scheme will not be offered for auto enrolment.
11. Employer adhered to the scheme:

Employer Full Name: Sure Start Property Solutions Ltd - No.12370595  
Address: 85 Great Portland Street, London W1W 7LT  
Contact Telephone Number: 020 7167 4394  
Number of people employed: None  
Registered for tax with HMRC: Yes  
PAYE Ref: Not Registered  
VAT Ref: 346 2016 26  
Corporation Tax Reference: 16034 02671  
Partnership Tax Reference: N/A  
Self-assessment tax reference: N/A. Employer is not an individual
12. N/A

13. Scheme Trustee:

Trustees:

Full Name: Mrs Trisha Theodore-Heath  
Address: Flat 254 Berglen Court, 7 Branch Road, London E14 7JZ  
Telephone Number: 07872 944 352  
National Insurance Number: NZ676686C

The above Trustee is also a scheme member.

Full Name: Mr. Stephen Heath  
Address: Flat 254 Berglan Court, 7 Branch Road, London E14 7JZ  
Telephone Number: 07592 715 434  
National Insurance Number: WM287733A

The above Trustees are also scheme members.

Accountant: Cerys Daniels, Mazuma GB Limited, Tel: 0845 310 5654  
Email: [help@mazumamoney.co.uk](mailto:help@mazumamoney.co.uk)  
Dragon House, Princes Way, Bridgend Ind Est, CF31 3AQ

Scheme Administrator:

RC Administration Limited  
Company Number: 12409200  
Company Address: 1a Park Lane, Poynton, Stockport, England, SK12 1RD  
Contact number: 07535 010 480

RC Administration Limited, which I am a director of, is a SSAS administration company.

I have performed scheme administration work for several years and I have the required pensions knowledge to act in this capacity. I am also registered as scheme administrator under ID number: A0150724.

Additionally, I am an advisor for Stratagem Financial Planning of 1 Park Lane, Poynton, Cheshire, SK12 1RD, who are authorised and regulated by the Financial Conduct Authority, FCA number 819330. I am also a member of the Chartered Insurance Institute. Please find enclosed the following to support my role within Stratagem Financial Planning:

1. An email from the Director & Chartered Financial Planner of Stratagem Financial Planning – David Shirley, confirming my role within the company.
2. Stratagem Financial Planning website print out, detailing key members of the team.
3. Stratagem Financial Planning – email signature.
4. FCA print out confirming the registration of Stratagem Financial Planning.

This is the only scheme that I have been instructed to be set up by the members Trisha Theodore-Heath and Stephen Heath.

I can confirm that the establisher is not a dormant company. The company is active with Companies House and has been set up for trading. The company was incorporated on the 19<sup>th</sup> December 2019. The establisher has asked their accountant to provide evidence that the establisher is not a dormant company, and I will forward this onto you upon receipt in the form of a letter from their accountant together with bank statements detailing their trading.

Should you require any further information, please advise me accordingly.

Yours sincerely,

*David Nicklin*

David Nicklin (CERT PFS)  
Director  
For and in behalf of  
RC Administration Limited

Enc.