

SSAS SET UP INFORMATION

Client Name/s	Alan Edwards & Julie Jarman
Scheme Name	Jual Edman Investments Pension Scheme
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	Intel Pensions (Towers Watson)
What are the Transfer values/contribution amount	£175,258.33
What percentage of customers funds are going into non standard investments	15%
Details of the investments the client (trustees) are considering	Regulated fund Skywatch Inn Ltd
The number of people employed by the scheme establisher	0
The corporation Tax reference of the employer The VAT registration number of the employer PAYE reference	Await this info – Company incorporated 29/10/14
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	High Net Worth
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.