



Mr Carl Glynn & Miss Sylvi Vaisanen  
44 Acre Moss Lane  
Kendal  
Cumbria  
LA9 5QE

17<sup>th</sup> March 2015

### **Application Pack for a new Small Self -Administered Scheme**

Dear Mr Glynn

Thank you for choosing Cranfords as the Scheme Administrator for your new Pension Scheme.

This Pack includes the following:

|                                    |  |
|------------------------------------|--|
| Application Form                   | Administration Agreement                         |
| Trust Deed & Rules                 | SSAS Establishment authority letter              |
| Member Information Form            | Pension Scams Leaflet and HMRC Liberation Update |
| SSAS Key Features & Member Booklet | Barclays Mandate                                 |

#### Application Form

Scheme Details – Please confirm the proposed name of your pension scheme and complete your contact details.

Principal Employer Details – Please fully complete the details required.

Additional/Participating Employer Details – if you would like an additional employer to participate in the scheme please complete the details here.

Employer Declaration – please read the details of the declaration – the declaration should be signed and dated by a Director of the Principal Employer.

Member Details – Please complete a separate sheet for each Member of the Scheme.

Member Declaration – please read the details of the declaration – a separate declaration should be signed by each Member Trustee.

Transfer Details – Please complete a separate sheet for each Member/Transfer required.

Nomination of Beneficiaries – Please complete a separate form for each Member confirming where to pay benefits in the event of your death. The nomination you make can be updated at any time by completing a new form.

Appointment of Financial Adviser – Please complete the details of your financial adviser here and also confirm any fees to be paid out of your scheme.

Fund Investments – Please advise here the proposed investments for the fund.



**t: 0844 410 0037 f: 0844 410 0038 e: [admin@cranfords.biz](mailto:admin@cranfords.biz) w: [www.cranfords.biz](http://www.cranfords.biz)**

Cranfords is the trading style of the company registered under the number of 3110950 at 1 The Pavilions,  
Cranford Drive, Knutsford Business Park, Knutsford, Cheshire WA16 8ZR  
and name of 3110950 Limited.



Administration Agreement - Please sign where required and arrange for your signature to be witnessed by an independent party (i.e. not a relative, partner or person living at the same address as you). Please return the signed Agreement. Please do not date this document as this will be dated once counter-signed by Cranfords.

Draft Trust Deed - This is to establish your Scheme. It is a Draft Trust Deed and it is advisable that you seek legal advice from a solicitor (authorised and regulated by the SRA).

Should you require legal advice from a solicitor before signing you can appoint a firm of your choice or we are happy to introduce you to a specialist firm of solicitors, Blake Morgan, with whom we have negotiated a preferential rate. Their estimated cost for this service is £350+VAT.

Please do not date the deed at this stage, we will date the deed on its return and retain a copy for our files. The original deed will be returned to you in due course for safekeeping.

SSAS Establishment authority letter – please complete, sign and return.

Member Information Form – please complete, sign and return one per member.

Barclays Mandate – In order for us to open and facilitate the scheme bank account please sign page two (under trustee) and page four (under all signatories). If the scheme is a multi-member scheme each member is required to sign this document.

Identity check – We complete an identification check electronically on your behalf. This identity check will be used to open the Scheme bank account. If we are unable to verify your identity online then we may require original documentation from you. If we request original documents they will be returned to you by registered post on the day of receipt.

It is important that you complete the enclosed paperwork as per the instructions, sign where indicated and return it to us in the envelope provided. I must point out at this stage, that we at Cranfords will only allow clients to operate their pension funds within the spirit of the pension legislation. This means we will not facilitate any form of pension liberation activity or assist others to do so. Please read the enclosed leaflets for further information regarding this.

I look forward to receiving your application pack but if you have any questions, please don't hesitate to call me on 0844 410 0037. Our offices are open from 9am to 5pm on Monday and Thursday, 9am to 6pm on Tuesday and Wednesday and 9am to 4pm on Fridays.

Yours sincerely,

Administrator



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