

SSAS Set up questionnaire

Telephone: 0300 634 4852 Fax: 020 8741 2522 Email: info@pensionpractitioner.com

Name of Scheme **MAI Alpha Pension Scheme**

Name of Company/
Employer creating the Scheme **My Goal Is ... Ltd.**

Serving Address for
Pension Correspondence **Regus Business Centre
Kiln Kiln House
Kiln Kiln**

Royal Wootton Bassett SN4 7AF

Telephone Number **0793 858215**

Contact Name **Neil Ryder**

Email Address **neil@mygoalis.ltd.com**

Accountant Details

Name of the Company **McGills Chartered Accountants**

Contact Name **Simon Nuttall**

Telephone Number **01285 652128**

Email Address **sgn@mcgills.co.uk**

Address **Osley House
Telford Road
Cirencester G71 1US**

Financial Advisor Details

Name of the Company **JAN Investment Marketing**

Contact Name **Robert Holmes**

Telephone Number **01793 611126**

Email Address **admin@jan-cash.co.uk**

Address **105 Victoria Road
Swindon
SN1 3BD**

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Telephone: 0800 638 4882 Fax: 020 8711 2622 Email: info@pensionpractitioner.com

Trustees

PLEASE FULLY COMPLETE THIS SECTION AS INDICATED

Trustee 1 Title (Mr, Miss, Mrs)

Mr.

Forename(s)

NEIL BERNARD ~~BERNARD~~

Surname

BERNARD

Date of Birth

24.11.1952

Proposed Retirement Date

24.11.2022

National Insurance Number

YR979943B

Home Address

1 Whitehorn Close
Royal Wootton Bassett
SN4 7HS

Is this Trustee also a Member?

☒ Yes ☒ No

Trustee 2 Title (Mr, Miss, Mrs)

Forename(s)

Surname

Date of Birth

Proposed Retirement Date

National Insurance Number

Home Address

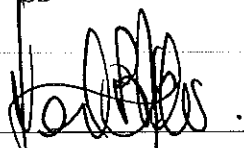
Is this Trustee also a Member?

☐ Yes ☐ No

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



Date

20/9/2016.