

SSAS Discovery (2024-05-03 15:00 GMT) - Transcript

Attendees

Oliver Youll, John Morley, Paul Davies

Meeting Summary

Ollie and John are Property Developers and Managers, I confirmed the business is trading, has published accounts and they both receive PAYE earnings. Their wives/partners also work with them.

They have heard a lot about SSAS Pensions and want to see if its right for them. They plan on making contributions from their excess profits each year, and also have existing Pensions valued at around £400k between them.

We discussed the set up process and requirements here, as well as touching on Commercial property purchase and the requirements for Loanback.

We discussed the two SSAS Products we have on offer, and decided SSAS premium was the best for their particular needs. I covered off the charges with them also.

We discussed the transfer process in detail also so they are aware of the exact requirements to effect a successful transfer.

I agreed to send them more information via email and agreed to a follow up in 2 weeks time.

Action Points - email additional information and schedule follow up for 2 weeks time.

Meeting ended after 00:40:06 🙌