## SSAS SET UP INFORMATION

Client Name/s  Client Name/s  Client Name/s  Cheme Name  MACADLIA  CRUSTEE  SCHEME  What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution  What are the Transfer values/contribution amount  What percentage of customers funds are going into non standard investments  Details of the investments the client (trustees) are considering  The number of people employed by the scheme establisher  The corporation Tax reference of the employer PAYE reference  Current employment status  STUART  MORGAN - PIRECTOR  Is the proposed Limited Company currently active  JAN Investment Marketing
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Financial Adviser Involved JAN Investment Marketing
If no Financial Adviser – explanation why
Classification of Client  HIGH NET WORTH  LD SIGNIFICANT PORTFOLIO.
Explanation as to why customer is setting up a SSAS
possibly employer related loan. Other Pension provisions already in place for all directors.