

SSAS SET UP INFORMATION

Client Name/s Members and Trustees	Neil Richard Ekins
Scheme Name	Kershon Limited
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	Reassure Castle and Wireless Friends Life
What are the Transfer values/contribution amount	upto 100K
What percentage of customers funds are going into non standard investments, unconnected third party loans, loan note structures.	None
Details of the investments the client (trustees) are considering	Potential Loan back
The number of people employed by the scheme establisher	none
The corporation Tax reference of the employer The VAT registration number of the employer PAYE reference	52926227 25774
Current employment status	Director
Is the proposed Limited Company currently active	Yes
Financial Adviser Involved	Finbarr Kelly Finance
If no Financial Adviser – explanation why	
Classification of Client Sophisticated High Net Worth Retail	Sophisticated
Explanation as to why customer is setting up a SSAS	take control of our pension
Names of introducers	Finbarr Kelly
Details of web based material:	

National Insurance
Number NE031998A