

### Existing Scheme Information

Please input your company information, this will be submitted to HMRC to approve set up of your SSAS.

Name of Scheme	:	UNION INVESTMENTS
Name of Principal Employer	:	UNION ACADEMY LIMITED
Servicing/Correspondence Address	:	3 QUILTER MEADOW OLD FARM PARK MILTON KEYNES MK7 8UD
Telephone Number	:	07962 481870
Contact Name	:	CASSANDRA FOOTMAN
Email Address	:	CASSIE@UNIONACADEMY.CO.UK
Corporate Tax Reference (UTR No.)	:	623 58754 26170A
VAT No.	:	N/A
PAYE No.	:	N/A

### Accountant Information (if applicable)

Name of Company	:	MHA Broomfield ALEXANDER
Contact Name	:	DAVID SEYMOUR
Correspondence Address	:	6 AGINCOURT STREET, MONMOUTH NP25 3QZ
Telephone Number	:	01600 712171
Email Address	:	DAVID.SEYMOUR@BROOMFIELD.CO.UK

## Add an Additional Trustee/Member

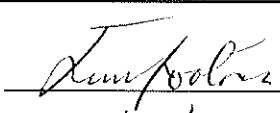
## Trustee Information

Title	:	MR
Forename(s)	:	JASON GARY
Surname	:	FOOTMAN
Date of Birth	:	01/08/71
N.I Number	:	NX13 6491B
Address	:	3 QUILTER MEADOW OLD FARM PARK MILTON KEYNES MK7 8QD

Carlton James Pension Administration act on behalf of the SSAS (Small Self-Administered Scheme) trustee, reporting the activity of their holdings in the scheme and assisting with the structure of the trustee investment strategy; we pride ourselves on offering a personal service. In addition, Carlton James Pension Administration work closely with your SSAS provider to ensure accurate accounting and governance of your pension scheme, this form will be submitted to Pension Practitioner, who are the Scheme Administrator in line with our Privacy Policy to appoint you as a Scheme Trustee.

## Declaration:

I/we request that Pension Practitioner provide the necessary documentation to appoint me/we as a Trustee(s) of the Scheme and provide members details of my/our membership. We accept that Pension Practitioner may charge for this and any other work associated with Trustee Appointment, in line with their terms and conditions and fee schedule.

Signature :	
Date :	24/5/19