

ENCLOSED IS TAKE OVER DOCUMENTS
FOR RF INVESTMENTS

Thanks
R



CARLTON JAMES

SSAS Takeover questionnaire

Telephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com

Name of Scheme

RF Investment Solutions Pension Fund.

Name of Company/
Employer creating the Scheme

RF Investment Solutions Ltd.

Serving Address for
Pension Correspondence

7 Beechey Avenue
Oxford
OX3 9JU

Telephone Number

07816 979925

Contact Name

RENATA LANZONI.

Email Address

renlan@hotmail.co.uk

HMRC and The Pensions Regulator

HMRC Pension Scheme
Tax Reference (PSTR)

Government Gateway User ID

Password

The Pensions Regulator
Scheme Reference (PSR)

Scheme Key

Accountant Details

Name of the Company

Contact Name

RENATA LANZONI.

Telephone Number

07816 979925

Email Address

renlan@hotmail.co.uk

Address

7 Beechey Avenue
Oxford.
OX3 9JU

2 SSAS Takeover questionnaire

Telephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com

Financial Advisor Details

Name of the Company

JAN Investment Marketing

Contact Name

Telephone Number

01793 611126

Email Address

Address

105 Victoria Road
Swindon
SN1 3BD

Current Administrator / Professional Trustee Details (Outgoing Trustee)

Name of the Company

Dawson Pensions

Contact Name

Telephone Number

Email Address

Address

Daws House
33-35 Daws Lane
London NW7 4SD

Continuing Trustees

Trustee 1 Title (Mr, Miss, Mrs)

Mrs.

Forename(s)

Renata

Surname

hanson

Date of Birth

1/1/1968

Proposed Retirement Date

1/1/2033

National Insurance Number

NY 08 96 72 A

Home Address

7 Beechey Avenue
Oxford
OX3 9JU

Is this Trustee also a Member?

☒ Yes ☐ No

3 SSAS Takeover questionnaire

Telephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com

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

Trustee 3 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

Trustee 4 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

4 SSAS Takeover questionnaire

Telephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com

Trustee 5 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

Trustee 6 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

When returning this form we require the following:

- A copy of the original Trust Deed and Rules and all subsequent amendment Deeds.
- Most recent scheme accounts

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

Renata Lanzoni

Signed

Name

RENATA LANZONI

Name

Date

2/10/14

Date