PP Pension

SSAS Takeover questionnaire

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

Name of Scheme: BOYD & LLOYD PENSION SCHEME.

Name of Company/ Employer creating the Scheme: ORIGIN (BRISTOL) LTD

Serving Address for Pension Correspondence: MR D LLOYD
BRINKWOOD
HEDGEMEAD CLOSE
STAPLETON, BRISTOL, BS16 1ER.

Telephone Number: 01179165615

Contact Name: MR DARREN LLOYD

Email Address: DARRENLLOYD@CLIFTONRUGBY.CO.UK

HMRC and The Pensions Regulator

HMRC Pension Scheme Tax Reference (PSTR): 00323109 RM

Government Gateway User ID: TBA.

Password:

The Pensions Regulator Scheme Reference (PSR): 10193105

Scheme Key:

Accountant Details

Name of the Company: BESPOKE TAX ACCOUNTANTS

Contact Name: NEIL DENNISS

Telephone Number: 01242 505970

Email Address: INFO@BESPOKETAX.COM

Address: DELTA PLACE, 27 BATH ROAD,
CHELTENHAM. GLOS GL53 7TH.

PP Pension

2 SSAS Takeover questionnaire

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

Financial Advisor Details

Name of the Company: CONSILIUM ASSET MANAGEMENT LTD

Contact Name: GRAHAM BOND

Telephone Number: 01454 321511

Email Address: GBB@CONSILIUM-IFA.CO.UK.

Address: VAYRE HOUSE, HATTERS LANE
CHIPPING SODBURY, SOUTH GLOS
BS37 6AA.

Current Administrator / Professional Trustee Details (outgoing rustee)

Name of the Company: CURTIS BANKS

Contact Name: STEVE GARDNER

Telephone Number: 0117 9107919

Email Address: STEVE.GARDNER@CURTISBANKS.CO.UK.

Address: GROUND FLOOR, 3 TEMPLE QUAY,
TEMPLE BACK EAST, BRISTOL, BS1 6DZ.

Continuing Trustees

Trustee 1 Title (Mr ~~Mrs~~ ~~Miss~~ ~~Mrs~~): Forenames: DARREN

Surname: LLOYD Date of Birth: 30/8/69.

Proposed Retirement Date: 65. National Insurance Number: NS246055C

Home Address: BRINKWOOD, HEDGEMEAD CLOSE
STAPLETON BRISTOL BS16 1ER.

Is this Trustee also a Member? ☑ Yes ☐ No

PP Pension

3 SSAS Takeover questionnaire

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

Trustee 2 Title (Mr Miss Mrs) ~~Mrs~~ Forename(s) ROBERT

Surname BOYD. Date of Birth 26/3/69.

Proposed Retirement Date 65. National Insurance Number NR906090D.

Home Address FLAT 2, 20 COLLEGE STREET

BURNHAM ON SEA, SOMERSET, TA8 1AS

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

PP Pension

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		Signed	
Name	MR D LLOYD	Name	
Date	25/1/17	Date	