

SSAS Set up questionnaire

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

Name of Scheme SM INVESTMENTS PENSION FUND

Name of Company/
Employer creating the Scheme SM INVESTMENTS LTD.

Serving Address for
Pension Correspondence 16 THE FIRS

COMBE DOWN

BATH BA2 5ED.

Telephone Number 07968 256190

Contact Name SALLY MORTON

Email Address SALLYMORTON22871@GMAIL.COM

Accountant Details

Name of the Company Sagers Accountants Ltd

Contact Name Richard Major

Telephone Number 0113 297 6789

Email Address R.Major@sagers.co.uk

Address Gresham House

5-7 St Pauls Street

Leeds, LS1 2JG

Financial Advisor Details

Name of the Company JAN Investments MARKETING.

Contact Name Jan Pietruszka

Telephone Number 01793 611126 / 07818007114

Email Address Robert@jan-cash.co.uk

Address 105 Victoria Road, Old town, Swindon
SN1 3BD

2 SSAS Set up questionnaire

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

Trustees

PLEASE FULLY COMPLETE THIS SECTION AS INDICATED

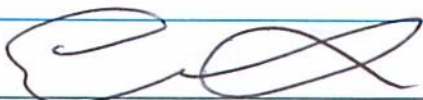
Trustee 1 Title (Mr Miss Mrs)	Miss	Forename(s)	Sally Anne
Surname	Morton	Date of Birth	22-08-1971
Proposed Retirement Date	70	National Insurance Number	NX 35 52 92 C
Home Address	16 The Firs Combe Down Bath BA2 5ED		
Is this Trustee also a Member?		☒ Yes	☐ No

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	

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



Date

14/02/2014