



Financial Services Limited
Local Matters, National Strength.

Date	1 June 2012	Our Ref	Laura Surtees
Brad Davies Pension Practitioner Daws House 33-35 Daws Lane London NW7 4SD		HW Financial Services Ltd Northern Assurance Buildings 9/21 Princess Street Manchester M2 4DN Tel: 0161 832 6413 FSA No. 134190	
Department		Your Ref	
Client Name	SPM SSAS		
Policy No			
DOB			
Enclosed:		Required	
<input type="checkbox"/>	Cheque	X	Acknowledgement
<input type="checkbox"/>	Anti Money Laundering Documents		Investment Schedule
<input type="checkbox"/>	Application Form		Policy Documents
<input type="checkbox"/>	DDM		Commission
<input type="checkbox"/>	Top Up Application		Confirmation of monies invested
<input type="checkbox"/>	Investment Managers Agreement		
X	Benefit statement form		
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			
FURTHER REQUIREMENTS			

Northern Assurance Buildings, 9/21 Princess Street, Manchester M2 4DN

Telephone: 0161 832 6413 **Fax:** 0161 834 2230 **Email:** laura.surtees@hwfs.co.uk

Authorised and regulated by The Financial Services Authority

Registered Office : 6 Chesterfield Gardens, London, W1J 5BQ Registered in England & Wales, company no. 2030706

FC
In order that we may prepare your benefit statement, we will require the total remuneration, inclusive of dividend income for each scheme member. Please give the name and remuneration below for income in respect of the tax year ending 5th April 2012.

	Salary per P60	Dividend (net)
LESLIE BUCKLEY	£63,500	£60,000
MARYLINDA BUCKLEY	£64,500	£40,000
PAUL BUCKLEY	£97,896	-
MICHELLE KNG	£5,000	-

**Fund Split in respect of each member:

Name of member:	% of fund
1
2
3
4

As per PP.com Records.

Additional Questions:

In relation to compulsory pension schemes for 05/04/2012-

- Do you have two or more salaried employees (excluding dividends) at your company? ☒ Yes ☐ No
- If yes, do you presently provide a pension scheme for them? ☒ Yes ☐ No
- If you hold commercial property in the pension scheme do you retain current:
 - 1. Building insurance? ☒ Yes ☐ No
 - 2. Landlord's liability insurance? ☒ Yes ☐ No

Signed: J Buckley

Date: 22/5/2012

Please return this form to Pension Practitioner .Com Limited at:

Daws House
33-35 Daws Lane
London
NW7 4SD

You can also email this form with other paperwork we may have requested you to provide in the cover letter to: **bradd@pensionpractitioner.com**