

SSAS SET UP INFORMATION

Client Name/s	① PAUL CHARLES SINGLETON ② SUSAN LUCY SINGLETON
Scheme Name	SINGLETON FAMILY SSAS
What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution	① IPS PENSION BUILDER – P C SINGLETON SCHEME 33325 ② LEGAL + GENERAL + PHOENIX LIFE
What are the Transfer values/contribution amount	① SEE ATTACHED SCHEDULE ② LG 131347 PHOENIX LIFE 152982
What percentage of customers funds are going into non standard investments	NONE
Investment Selection with approximate amounts allocated per selection	SEE ATTACHED FOR EXISTING ALLOCATION
The number of people employed by the scheme establisher	2 1 - P C SINGLETON
Current employment status	① MANAGING DIRECTOR ② SELF EMPLOYED
The corporation Tax reference of the employer	86819 12112
The VAT registration number of the employer	S31 5793 41
PAYE reference	120/TA 58144
Is the proposed Limited Company currently active	YES
Financial Adviser Involved	NONE
If no Financial Adviser – explanation why	NOT NECESSARY - CHARTERED ACCOUNTANTS WITH LONG ESTABLISHED SCHEMES
Classification of Client	?
Any web based material;	?
Introducers	TAG WEALTH MANAGEMENT
Details of investments	SEE ATTACHED SCHEDULE
Explanation as to why customer is setting up a SSAS	WANTS A SCHEME THAT INCLUDES WIFE'S SCHEME.