

SSAS SET UP QUESTIONNAIRE

Name of Scheme THE IDEAL WINDOW SOLUTIONS SSAS

Name of Company/Employer creating the Scheme IDEAL WINDOW SOLUTIONS LIMITED.

Serving Address for Pension Correspondence 12 BLACKBROOK BUSINESS PARK
BLACKBROOK ROAD
FAREHAM
HANTS PO15 5DR

Telephone Number 01329 238399

Contact Name CHRIS PALMER

Email Address Chris.Palmer@idealwindowsolutions.co.uk.

Accountant Details

Name of the Company CW FELLOWES BUSINESS AND TAX ADVISERS

Contact Name LEE BEAUMONT

Telephone Number 01329 220554

E-mail address LBeaumont@cwfellows.com

Address CARNAC PLACE
CARNAC COURT
CAMS HALL ESTATE
FAREHAM PO16 8UY

Financial Advisor Details

Name of the company

INDEPENDENT FINANCIAL SERVICES + WEALTH
MANAGEMENT

Contact name

BRADLEY WHELAN

Telephone Number

02392 470643

E-mail address

bradley@ifswm.net

Address

3 THE OAKWOOD CENTRE

DOWNLEY ROAD

HAVANT

HANTS PO9 2NP.

Trustees

Name of Trustee 1

CHRISTOPHER NICHOLAS PALMER

Title (Mr, Miss, Mrs)

MR.

Date of Birth

01-07-68

Proposed Retirement Date

01-07-2028.

National Insurance Number

NR062188C

Home Address

5 HEYSHOT GARDENS

CLANFIELD

HAMPSHIRE

PO8 0XG.

Is this Trustee also a Member

☒ Yes ☐ No

Name of Trustee 2

THOMAS EMERSON

Title (Mr, Miss, Mrs)

MR.

Date of Birth

02-11-60.

Proposed Retirement Date

02-11-2030.

National Insurance Number

WL 898909D.

Home Address

70 PORTCHESTER ROAD

FAREHAM

PO16 8QJ

Is this Trustee also a Member

☒ Yes / No

Name of Trustee 3

AMANDA JANE PALMER.

Title (Mr, Miss, Mrs)

MRS.

Date of Birth

06-08-69

Proposed Retirement Date

06-08-2028.

National Insurance Number

NS130024A.

Home Address

5 HEYSHOTT GARDENS

CLANGFIELD

HAMPSHIRE

PO8 0XG.

Is this Trustee also a Member

☒ Yes / No

Name of Trustee 4

BRADLEY TERENCE WHELAN.

Title (Mr, Miss, Mrs)

MR.

Date of Birth

14-07-1970.

Proposed Retirement Date

14-07-2030.

National Insurance Number

NW 03 63 17 B.

Home Address

5 WESTBROOKE CLOSE

HORNDEN

WATERLOOVILLE PO8 9DE

Is this Trustee also a Member

Yes ☒ No ☐

Register with Pensions Regulator

Yes / No (Pension Practitioner .Com to complete)

Please return this form to:

info@pensionpractitioner.com

Alternatively, post this form to:

Pension Practitioner .Com Limited

Daws House

33-35 Daws Lane

London

NW7 4SD

Signed:



Date:

27-11-12.