

SSAS Set up questionnaire

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

Name of Scheme THE OPENSOFAT SSAS

Name of Company/
Employer creating the Scheme OPENSOFAT LTD

Serving Address for
Pension Correspondence KNARESBOROUGH TECH PARK

MANSE LAKE

KNARESBOROUGH

HG5 8LF

Telephone Number 07947 279958

Contact Name MARC BOOFORD

Email Address marc.booford@opensoftsystems.co.uk

Accountant Details

Name of the Company

Contact Name

Telephone Number

Email Address

Address

Financial Advisor Details

Name of the Company TAG Wealth Management

Contact Name David Thompson

Telephone Number 0114 263 0888

Email Address info@tag.uk.com

Address Riverdale, 89 Graham Road, Sheffield, S10 3GP

2 SSAS Set up questionnaire

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

Trustees

Trustee 1 Title (Mr, Miss, Mrs) **Mr**

Forename(s) **Mark Vernard**

Surname **Bedford**

Date of Birth **13/06/1968**

Proposed Retirement Date

National Insurance Number **NR 19 24 00 D**

Home Address **Conkers, The Ridge, Linton, LS22 4HJ**

Is this Trustee also a Member?

☒ Yes ☐ No

Trustee 2 Title (Mr, Miss, Mrs) **Mrs**

Forename(s) **Jillian Dawn**

Surname **Bedford**

Date of Birth **31/07/1972**

Proposed Retirement Date

National Insurance Number **NY 34 74 56 C**

Home Address **Conkers, The Ridge, Linton, LS22 4HJ**

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

M V Bedford

J. D. Bedford

Date

16 Dec 14

17. Dec. 14