



**Preferred
Pension**
Invest in your future

SSAS Pack

Client Name	Neville Rogers
Reference	6010626
Date Pack In	09.07.2014
Introducer	Hightown Agencies LTD

Stage 1.

Photo I.D.	✓
Proof Of Address	✓
Copy of Pension Statement	✓
Signed and complete L.O.A	✓
SSAS Company Formation Letter	✓
SSAS Application Form	✓
SSAS Establishment Letter	✓
Administration Agreement	✓
Member Information	✓
Trust Deed Form	✓
Notes: Complete pack in	

Stage 2.

Letter from Provider/Pension Valuation	
Transfer Documents	
Notes:	

Stage 3.

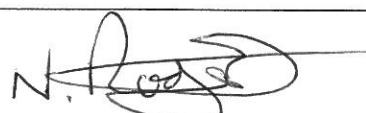
Investment Mandate (1 for each Investment choice)	
Tax Free Letter (If applicable)	
Liberation Letter	
Completed Transfer Documents from ceding company	
Notes:	

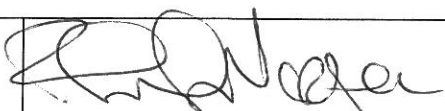
Preferred Pension contact sheet (CFL)

Preferred Pension LLP	
Stafford Court 145 Washway Road Sale M33 7PE	
Client Name	Mr Neville Rogers
PP Reference	6010626
Trevoc Reference	

	Documents included	Documents Returned
Company Formation Letter	Y	✓
Letter of Authority	Y	✓
SSAS Scheme Application Form	Y	✓
SSAS Establishment Letter	Y	✓
Cranfords Administration Agreement	Y	✓
Trust Deed	Y	✓
Membership Information Questionnaire	Y	✓

Specific Instructions	<p>Proof of ID & address required. Please certify the <u>front</u> of the photo ID and the <u>front</u> of the Proof of Address</p> <p>PLEASE ENSURE YOU REFER TO THE STEP BY STEP GUIDE AND THE TEMPLATE DOCUMENT PROVIDED TO ASSIST YOU WITH THIS COLLECTION. PLEASE CALL TREVOC OR PREFERRED PENSION ON 0161 709 9210 FOR ASSISTANCE. (M-T: 9-8 / F: 9-4).</p>
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I can confirm that the Trevoc Representative has not given any advice regarding the suitability of the product.			
Client signature		Date	7-7-2014

Representative signature		Date	7/7/14
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Stafford Court, 145 Washway Road, Sale, M33 7PE

Letter of Authority

Name:	Mr Neville Rogers
Address:	288b Wallisdown Road Bournemouth Dorset BH11 8PN

To whom it may concern,

Policy Provider	Policy Number
Legal + General	NH067682A

I, **MR NEVILLE ROGERS**, hereby authorise Preferred Pension LLP, Stafford Court, 145 Washway Road, Sale, M33 7PE to receive upon their request any information in connection with the aforementioned and any other policies that I hold with your company, or any other of your group of companies.

Please send all relevant documentation and discharge forms relating to my policy/policies by post to Preferred Pension LLP, Stafford Court, 145 Washway Road, Sale, M33 7PE as soon as possible.

This authority is valid until cancelled in writing.

Yours faithfully,

Sign:  X

Date: 09-07-2014

DOB: 10-6-1965.

NI Number: NH067682A.