**SSAS Instructions Guide**

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| **Documents To Printed Prior To Appointment** |
| **Document** | **Number of Signatures**  | **Number of Witness Signatures** | **Return to Preferred Client** | **Additional Instructions**  |
| SSAS Company Formation letter | 1 | N/A | YES | Client to sign where it says ‘signed’. |
| SSAS EstablishmentAuthorisation letter | 1 | N/A | YES | Client to sign between ‘yours faithfully’ and ‘clients name’ |
| SSAS Scheme Application Form | 2 | N/A | YES | Page 2- to be signed and dated by client.Page 3- to be completed by client. Page 4 – to be signed by client and dated.Page 6- to be completed by client.All other pages please leave blank. |
| AdministrationServicesAgreement | 1 | 1 | YES | Client to sign on page 11 in section ‘signed by’ and ‘(Trustee)’.Agent to sign witness signature on the form. |
| Trust Deed | 2 | 1 | YES | Page 14 – client to sign twice. Once by the first 3 brackets and once by the second lot of 3 brackets. Agent to sign witness signature on the form. |
| Letter of Authority (If Applicable) | 1 | N/A | YES | Client to sign where indicated with an ‘X’ |
| Predators Stalk Your Pension | N/A | N/A | NO | Client to keep this document |
| SSAS Information initial enquiry response | N/A | N/A | NO | Client to keep this document. |
| Pension Liberation Update  | N/A | N/A | NO | Client to keep this document |

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| **Additional Documents To Collect From The Client At The Appointment** |
| **Document** | **No. of copies to be taken** | **Instructions** |
| Photo ID – (Passport or Driving Licence. Must be current. Alternatively we can accept birth certificates). | 1 | * Take a **clear copy** of the full document.
* Verify the document with: “I certify this to be a true copy of the original.” (Provide name & position and sign and date).
* Print and return a copy in pack
* Email a second copy to Document Collection Company.
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| Proof of address- (Copy of Bank Statement, Utility Bill or Council Tax Bill. Must be current and dated within last 3 months). | 1 | * Take a **clear copy** of the full document.
* Verify the document with: “I certify this to be a true copy of the original.” (Provide name & position and sign and date).
* Print and return a copy in pack.
* Email a second copy to Document Collection Company.
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