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| Client Name/s | Whitecliff Management Corporation Limited |
| Scheme Name | Whitecliff  |
| What ceding schemes are the transfers coming from If not transfers – source & explanation of contribution | Employment income  |
| What are the Transfer values/contribution amount | 20% of employment income (cca £30-50k p.a.) |
| What percentage of customers funds are going into non standard investments | 0% |
| Investment Selection with approximate amounts allocated per selection | Commercial property – 100% up to £400,000; at a later stage shares in UK companies |
| The number of people employed by the scheme establisher | 6 |
| Current employment status | Fully employed – two directors and one senior employee |
| The corporation Tax reference of the employer The VAT registration number of the employer PAYE reference | 3902613001GB 193916276120/LB09596 |
| Is the proposed Limited Company currently active | yes |
| Financial Adviser Involved  | no |
| If no Financial Adviser – explanation why  | Directors have sufficient investment experience |
| Classification of Client |  |
| Any web based material; | http://whitecliff-im.com/ |
| Introducers |  |
| Details of investments  | Commercial property, at a later stage shares in UK companies |
| Explanation as to why customer is setting up a SSAS | Saving for retirement |