

SSAS Set up questionnaireTelephone: 0800 634 4862 Fax: 020 8711 2522 Email: info@pensionpractitioner.com

Name of Scheme Wilson Bros SSAS

Name of Company/
Employer creating the Scheme Wilson Bros LtdServing Address for
Pension Correspondence 35 Kirk Street

sheffield

S4 7JX

Telephone Number 0114 272 6179

Contact Name Roger Bartrim

Email Address sales@wilsonbros-sheffield.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) Roger

Surname Bartrim

Date of Birth 27/07/1952

Proposed Retirement Date

National Insurance Number YS-69-21-11-A

Home Address 64 Main Road

Holmesfield

Sheffield

S18 7WT

Is this Trustee also a Member?

☒ Yes ☐ No

Trustee 2 Title (Mr, Miss, Mrs) Mr

Forename(s) Carl Alexander

Surname Rodgers

Date of Birth 24/10/1983

Proposed Retirement Date

National Insurance Number JK-35-75-30-C

Home Address 11 Matthews Fold

Sheffield

South Yorkshire

S8 8JT

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

Date