



AMPS  
ASSOCIATION OF  
MEMBER-DIRECTED  
PENSION SCHEMES

William Voegt  
Liongate Welath  
Heron Tower  
110 Bishopsgate  
London  
EC2N 4AY

9<sup>th</sup> January 2018

**Re: Application Pack for a new Small Self -Administered Scheme**

Dear William,

Thank you for choosing Cranfords as the Scheme Administrator for your client's new Pension Scheme. This Pack includes the following:

SSAS Establishment authority letter  
Trust Deed & Rules  
Administration Agreement  
Pension Scams Leaflet and HMRC Liberation Update  
Member Information Form x 2  
SSAS Fee Schedule  
SSAS Key Features & Member Booklet & Risk Warnings

**Draft Trust Deed** - This is to establish the Scheme. It is a Draft Trust Deed and it is advisable that the clients seek legal advice from a solicitor (authorised and regulated by the SRA).

Should they require legal advice from a solicitor before signing they can appoint a firm of their choice or we are happy to introduce them to a specialist firm of solicitors, Birketts. An introduction to them can be arranged if needed.

Please do not date the deed at this stage, we will date the deed on its return and retain a copy for our files. The original deed will be returned to the clients in due course for safekeeping.

**Administration Agreement** – They will need to read this and ensure they understand it. Please ask them to sign and have this witnessed to confirm that they agree with the terms, and return the original to us.

**SSAS Establishment authority letter** – please complete, sign and return.

**Member Information Form** – please complete, sign and return one per member.



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**T: 0844 410 0037 e: admin@cranfords.biz W: www.cranfords.biz**

'Cranfords' is the trading style of 3110950 Ltd.(No. 3110950.) Cranfords is  
registered in England at 48 Chorley New Road, Bolton, BL1 4AP.



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**Identity check** – We complete an identification check electronically on the clients behalf. This identity check will be used to open the Scheme bank account. If we are unable to verify the client identity online then we may require original documentation from you. If we request original documents they will be returned by registered post on the day of receipt.

It is important that they complete the enclosed paperwork as per the instructions, sign where indicated and return it to us. **Where the form requires it to be witnessed, this must be done by an independent person and somebody who is not related to the client in any way.**

I must point out at this stage, that we at Cranfords will only allow clients to operate their pension funds within the spirit of the pension legislation. This means we will not facilitate any form of pension liberation activity or assist others to do so. Please ask the clients to read the enclosed leaflets for further information regarding this.

I look forward to receiving the completed application pack but if you have any questions, please don't hesitate to call me on 0844 410 0037. Our offices are open from 9am to 5pm on Monday to Friday.

Yours sincerely,

**Emma Dane**  
**Senior Pensions Administrator**



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