



FAO: Mr John Bhandal
HM Revenue and Customs
Pension Schemes Services
BX9 1GH

Date

Dear Mr Bhandal,

Your Ref: APSS530
SRN: S000000XXXX
Scheme Name XXXXX

Thank you very much for your letter dated the XXX 2021. Please find a response to your queries below.

1. (and 2.) Please find enclosed a copy of the Establishing Trust Deed dated the XXX 2021 and a copy of the Scheme Rules with ref: Scheme Rules – Nov18.
3. There are no additional Scheme Administrators of the Scheme.
4. Please see the Establishing Trust Deed dated the XXX 2021.
5. We have instructed the Member Trustees not to open a bank account for the scheme yet, as Cater Allen will require confirmation that the scheme is a UK Registered Pension Scheme.
6. The intended member is: Member Name (Tel: XXX) (NI: XXXX) of add Address
7. As a company, we do not use any promotional marketing material, except for a basic website <http://indigotrustees.co.uk/> As per the answer to question 6, the target membership for this particular scheme at this time is two. However, Membership is open to other Employees of the Sponsoring Employer who may wish to join the scheme in the future (with it being a SSAS, there is an overall membership cap at 11 members). Please find enclosed a copy of our Key Features Document which was issued to the Employer and intended Members, before starting the application process.
8. There are no investment advisers appointed by the Scheme at this time. The Member Trustee is planning to fund the Scheme by receiving pension transfers (totalling c. £XXXXk). Registered with HM Revenue & Customs as a Scheme Administrator ID A2002133. The Scheme will also own a Current Account (Reserve Account) with Cater Allen Private Bank.
9. Likely to be around £XXX.
10. No, this is not intended to be an auto enrolment compliant pension scheme.



11. The Sponsoring Employer is XXXXX
Registered and Trading Address: XXXXX
Telephone: XXXXX
The Company employs 1 member of staff who is also the Director.
Company registered tax XXXXX
Company XXXXX
Company VAT XXXXX
The Company's Tax reference number is XXXXX
12. Not Applicable as this is an Occupational Pension Scheme.
13. Indigo Trustees Limited (company number 10863962) of 27-29 High Street, Ewell, Epsom, Surrey, KT17 1SB (Tel: 07860200302). The main contact at Indigo Trustees Limited is myself, Mr David Ware. The Scheme has XXXXX Trustee: Name of Trustee (Tel: XXXXX) (NI: XXXXX) of Address and Indigo Trustees Limited (company number 10863962) of 27-29 High Street, Ewell, Epsom, Surrey, KT17 1SB (Tel: 07860 200 302).

I trust that this is satisfactory, but should you have any questions or queries then please do not hesitate to contact me.

Yours sincerely

Mr David Ware
Director

Encl: Trust Deed