

MAKING YOUR RETIREMENT A SUCCESS STORY

Dear

Our objective is to ensure that we support you in making your retirement a success story.

For this reason, I as your SSAS consultant will discuss and help you implement your strategy. Our platform allows you to manage and view how your investments are performing based on the strategy you have chosen.

I will give you guidance on connecting your investments into your dashboard and I work with a number of partners to help you along the way.

For example, if you wish to self trade in stocks and shares we work with Interactive Brokers and can connect share dealing into your account. If you prefer the safety of long term deposits we work with Insignis Cash Manager to access you the best money market rates. All fully regulated and protected by the financial services compensation scheme. Property, loans and investments you wish to make will be linked to your SSAS account by your dedicated administrator.

Your dashboard connects all your chosen investments together giving you a holistic picture of what is going on with your money and in-app assistance is on hand for help and guidance when you need us.

We also keep you safe, compliant with HMRC and handle all the tax returns for your pension fund. The key documents for your SSAS are stored in your Documents Centre and we have also created a function called My Documents for you to keep information, important to you.

Please use your account for all pension transfer you wish to make, and all updates will be notified to you via your account.

Finally, thank you for joining us. We will be there for you every step of the way.

Paul

Paul Davies
SSAS Partner