



SSAS APPLICATION FORM

Please complete in block capitals and in black ink, ticking boxes where appropriate

SCHEME NAME

NUMBER OF MEMBERS

1 Principle Employer Details

Name

Employer Year End

D	D	M	M
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Correspondence Address

Post Code

Registration Number

Registered Office Address (if Different)

Post Code

Telephone Number

Fax Number

Corporation Tax District

Email Address

Ref

Employer Status

PAYE District

Please advise if the employer is limited, limited by guarantee, unlimited, limited liability, a partnership, or other

Ref

Nature of Business

2 Additional Participating Employer

Is any employer, other than the principle employer, to participate in the SSAS?

Yes No

If 'Yes', please complete the following:

Name of the Participating Employer

Relationship to the Principal Employer

Please copy page and complete those details for this employer.

3 Independent Financial Adviser (IFA) (if appropriate)

Please give details of the IFA who will provide advice on the scheme to the Member Trustees

Contact Name

Telephone

Company Name

Fax

Address

Email

Regulated by

Authorisation Number

Post Code

4 Accountant (if applicable)

Please provide details of the accountant acting for the principle employer.

Contact Name

Email

Accountancy Firm's Name

Address

Telephone

Fax

Post Code

5**Initial Contribution Details**

Please provide details of the proposed first contribution for each member and the total contribution.

If a member has benefits which are subject to enhanced protection, the protection will be lost if a contribution is paid by / for them.

Please ensure you seek independent advice from your financial adviser before paying contributions into the scheme.

Name	<input type="text"/>	Amount	£ <input type="text"/>
Name	<input type="text"/>	Amount	£ <input type="text"/>
Name	<input type="text"/>	Amount	£ <input type="text"/>
Name	<input type="text"/>	Amount	£ <input type="text"/>
Name	<input type="text"/>	Amount	£ <input type="text"/>
Name	<input type="text"/>	Amount	£ <input type="text"/>
Name	<input type="text"/>	Amount	£ <input type="text"/>
Name	<input type="text"/>	Amount	£ <input type="text"/>
Total			£ <input type="text"/>

6**Declaration**

On behalf of the Principle Employer we agree to establish the SSAS and enclose with the Application a fully completed Member Questionnaire for each member invited to join.

We confirm we are acting in accordance with the Memorandum and Articles of Association of the Company or Partnership Agreement.

We request Astute Trustee Services Limited provide the necessary documentation to establish the scheme and provide the members with details of their membership on our behalf. They are entitled to charge for this and any other work associated with the establishment of the scheme.

We agree to Astute Trustee Services Limited appointing the professional trustee company of its choice to act as Professional Trustee and Scheme Administrator of the pension scheme.

We confirm we understand that once a contribution has been made to the scheme, it cannot be returned without incurring a tax charge.

The information provided on this form is correct to the best of our knowledge.

PLEASE NOTE: The information on this form and any supplementary information provided by you and/or your nominated advisers, now or in the future, will be used by Astute Trustee Services Limited to:

1. Set up and administer the pension scheme;
2. Send information relating to the pension scheme to any of the trustees of the scheme;
3. Give essential information about your SSAS to others if necessary to run your SSAS and for regulatory purposes. Information about you will be kept after your scheme closes.

To be signed by two directors or a director and company secretary to the principle employer if they are a limited, limited by guarantee or unlimited company:

Signature

Print Name

Position

Date

D	D	M	M	Y	Y	Y	Y
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Signature

Print Name

Position

Date

D	D	M	M	Y	Y	Y	Y
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Astute Pensions is a trading name of Astute Trustee Services Limited which is registered in England and Wales with number 07944236 and whose registered office is at 87 Watling Street Road, Fulwood, Preston, PR2 8BQ. Astute Trustee Services Limited is authorised and regulated by the Financial Conduct Authority.