

# NEW SSAS FORM

## Individual Information

Please complete one form for each Member of the SSAS or Director of a sponsoring employer

Title

Full Legal Name

Include all middle names

Preferred Name (if different)

Date of Birth

Gender

Director of a company linked to the SSAS

YES

NO

To be a Member of the SSAS

YES

NO

Main Contact

Select one individual to be the main contact

YES

NO

Nationality

Please list all nationalities

National Insurance Number

Format: 2 letters followed by 6 numbers followed by 1 letter

Example: QQ123456C

Unique Taxpayer Reference Number (If you do not have a UTR number, confirm reason why)

Format: 10 numbers

Example: 12345 67890

Residential Address

Has this been their residential address for more than 12 months?

YES

NO

If no, please provide the previous registered address

Contact Email

Contact Phone Number

I confirm the individual is not bankrupt and I have no reason to believe they will be made bankrupt in the next 12 months

YES

NO

**Important Note:** Information must match that held by HMRC, which can be checked online at [www.gov.uk/personal-tax-account](http://www.gov.uk/personal-tax-account). Any differences will result in registration delay or rejection.

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## Transfers & Investment Information

### **Expected Pension Transfers** (If applicable)

Please provide information of any expected pension transfers into the SSAS:

Provider	Policy/Account Number	Approximate Value

*Please duplicate this page to list any additional transfers if required.*

*Please provide copies of recent valuations of your existing schemes to transfer in, as HMRC may require evidence of the expected transfers and source of the transfers.*

### **Expected Contributions into the SSAS** (If applicable)

Please confirm the contribution amount into the SSAS in the first year

### **Projected Fund Value at the end of the first year of the pension scheme's existence**

Please confirm the amount below

### **Intentions of the SSAS**

Please provide a brief description of any investments intended to be made within the scheme and the investment amount