

NEW SSAS FORM

Company Information

Please complete one form for each sponsoring employer to the SSAS

Company Name

Number of Directors

Please complete an 'Individual Information' form for each Director

Number of Employees (Excluding Directors)

VAT Registration Number

Format: 9 numbers

Example: 123456789

If not VAT registered, write NOT REGISTERED

PAYE Reference

Example Format: 123/AB456

If not registered for PAYE, write NOT REGISTERED

Companies House Number

Format: 8 numbers or 2 letters followed by 6 numbers

Example: 01234567

Corporation Tax Unique Taxpayer Reference Number

Format: 10 numbers. If it is 13 numbers, enter the last 10

Example: 12345 67890

Registered Address

Has this been the registered address for more than 12 months?

YES	<input type="checkbox"/>
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NO	<input type="checkbox"/>
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If no, please provide the previous registered address

Contact Email

Contact Phone Number

Has the company been classed as dormant in the last 12 months?

YES	<input type="checkbox"/>
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NO	<input type="checkbox"/>
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If yes, please provide the date trading commenced and details of any dormant periods

Important Note: *If the company was established within last 12 months or has been classed as dormant within the last 12 months; as a minimum, HMRC will require written confirmation from a qualified accountant confirming that company is now actively trading before submitting registration to HMRC.*

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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. 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