

SSAS

Small Self Administered Scheme



talbotandmuir

Providing Administration to Self Invested Pensions

Talbot and Muir 22-26 Clarendon Street Nottingham NG1 5HQ

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talbotmuir.co.uk

Innovative
Independent
Bespoke



innovative

If you have any questions
or you would like to speak
to one of our team call
0115 841 5000 or visit

talbotmuir.co.uk

SSAS Small Self Administered Scheme

Talbot & Muir is an independent company specialising in the provision of administration, trustee and technical services for fee-based pension arrangements.

■ Experienced & Independent

Talbot & Muir was founded in 1993 by Brian Talbot and Graham Muir to provide pension administration and trustee services to Self Administered Pension Schemes. In January 2000 and in response to market demand and changes in pension legislation, we created our own SIPP product - Elite Retirement Account - and launched a dedicated SIPP administration business.

By combining an innovative and flexible approach to self-investment whilst dispensing with unnecessary bureaucracy, we have developed a reputation as specialists within this market.

As a dedicated SSAS administration service, to allow us to focus on what we do best and to avoid any potential conflict of interest, Talbot & Muir do not offer any

investment or financial advice. The majority of our business is in conjunction with professional advisers wishing to operate SSASs on behalf of their clients.

■ Compliant

A Small Self Administered Scheme (SSAS) is a registered pension scheme. Like all registered pensions schemes, SSASs act as a vehicle to save for retirement, being afforded the same generous tax incentives by HMRC. However, the increased flexibility provided by SSASs gives the member greater choice over how the assets of the pension fund are invested and how the benefits may be taken.

The choice and diversity that is available to SSASs mean that although it may appear to be the most suitable vehicle for planning your retirement, it can also be one of the most complicated. Therefore, we must stress the importance of taking advice from an authorised financial adviser before establishing a SSAS.

Please be mindful that we are not able to provide any advice as to the suitability of a SSAS for your purposes or any investments you may be seeking to make.

If you want to know more about SSASs and the types of investments you can make with the assets of your SSAS, please contact us or visit our website.

independent



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■ Supporting IFAs

We work closely with professional financial advisers who utilise our specialist SSAS administration services for their clients. We support and provide an invaluable technical resource for you to draw upon when advising on retirement planning strategy and the feasibility and mechanics of underlying investments.

clients' schemes. In addition to this, you will have a consultant available to you to discuss complexities surrounding pensions legislation.

We provide a personal service to you and your clients. In stark contrast to many of our peers, we do not departmentalise our administration function, and we actively avoid the faceless call-centre approach that many of them have adopted. Your client will receive "cradle to grave" administration from a single administrator assigned to them from inception. We do our utmost to ensure that each IFA who refers clients to us has a designated administrator who will look after all their



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■ Competitive

In addition to providing a superior administrative and trustee service, we believe that it is important to both advisers and clients that we offer competitive

charges. We strive to ensure that our fee-based services are indicative of work undertaken, rather than adopt a rigid and inflexible charging structure.





■ Getting Personal

The principals of Talbot & Muir are some of the most respected individuals within the industry. Individually and collectively, they possess an enviable amount of experience in working with SSASs and unsurpassed knowledge of how they can be utilised within a commercial environment.

As well as overseeing the day-to-day running of Talbot & Muir and focusing on business strategy to ensure that the company is at the forefront of the SSAS market, the principals also act in a consultancy capacity to existing and new professional advisers and business introducers.



Brian Talbot

Brian has been involved in pensions for over 40 years, including a stint as Managing Director of a leading national SSAS/SIPP provider. In 1993, together with Graham Muir, he formed Talbot & Muir, creating a specialist pensions consultancy and administration company offering specialist services to owner-manager companies and their advisers.

Graham Muir

Graham originally trained as a Chartered Accountant before embarking on a career within the pensions industry. Graham draws upon this experience now when dealing with many of his professional connections and their clients. After six years of working in the SSAS/SIPP administration industry, during which Graham undertook a number of roles ranging from consultancy to discretionary fund management, Graham joined forces with Brian Talbot to establish Talbot & Muir in 1993.

■ Keeping in Touch

Telephone

0115 841 5000

Fax

0115 841 5027

Email

enquiries@talbotmuir.co.uk

Web

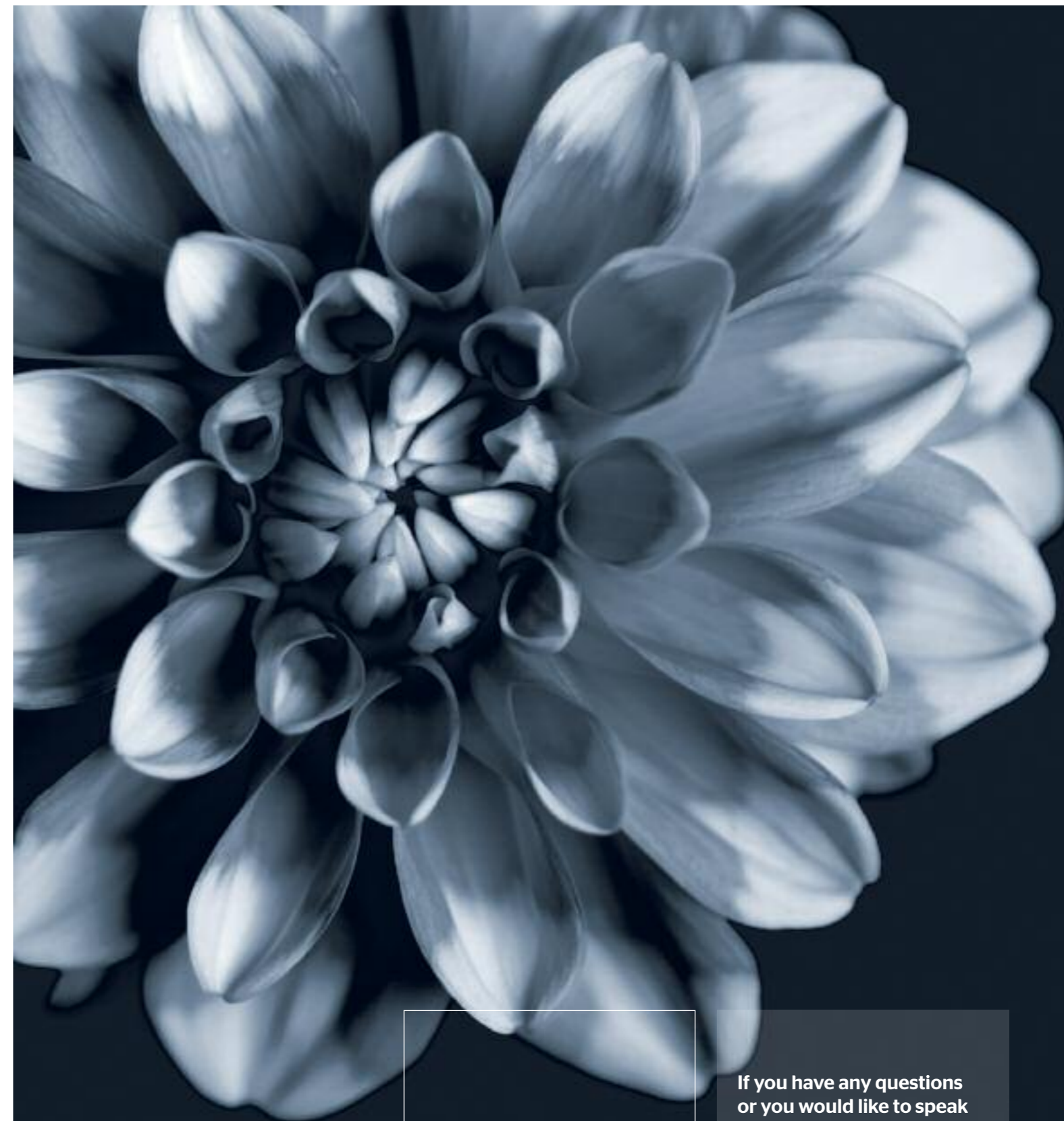
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David Bonneywell

David brings a wealth of experience in working within the self invested pensions market. He was previously involved in the banking sector and, since moving into the pensions industry, has held senior positions with some of the most well-known and highly-regarded organisations in the market. David joined Brian Talbot and Graham Muir in 2003, when Southall Asset Management was acquired by Talbot & Muir.



bespoke

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