

Free SSAS review

In offering this review service we are not providing any form of financial advice and our report should not be relied upon as a document from which financial decisions should be made. Advice should only be taken from a suitably qualified FCA regulated adviser, carrying the appropriate FCA permissions.

Recently published data indicates that there are in excess of 30,000 SSAS currently in existence. It is our experience that many of those schemes have been 'orphaned' of advice and are often run without the benefit of a professional trustee or administrator.

By definition, a SSAS is often a sizeable pension fund and will inevitably include controlling directors as the principal members. The SSAS can, therefore, be the gateway to a substantial new client, providing you have the key to that door.

This is where our free SSAS review service comes in

Working in partnership with you and your professional connections we can deliver a valued and comprehensive service that will enhance your reputation with the underlying client and lead to significant business opportunities for you.

What we offer

Our review will mainly focus on the administration, structure and pricing of the SSAS, and once our review is complete we will provide you with an opinion covering the following areas:

- Scheme documentation review – we will provide comment as to whether the Scheme rules currently in place reflect current legislation, as well as any other issues
- Investment compliance check (to check compliance with HMRC rules/practice)
- Review of benefits in payment to check compliance with HMRC limits where applicable
- Checking roles within scheme – e.g. who is the Scheme Administrator(s) registered with HMRC, who are trustees and any issues/potential liabilities that may flow from this
- Review of latest scheme accounts (where available)
- Any specific issues that we are asked to look at such as unauthorised payments, administration deficiencies, etc.

Getting started

It's easy – just call our Adviser Support team (Chris Hall and Helen Carr) on 0115 841 5000 or your usual Talbot and Muir contact. We will set out the information and documents we require in order to supply our review, or if you prefer a brief overview.

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