

# New SSAS member details form

The information supplied will be held in the strictest confidence and subject to General Data Protection Regulation.

Following receipt of this questionnaire and the New SSAS Scheme Questionnaire, we will be in a position to draw up the relevant deeds which we will send on to you along with our fees and services declaration.

**We will only establish a SSAS and accept transfers from clients who have been advised to do so by an FCA regulated adviser.**

## 1 Member details

|  |  |
|--|--|
| <b>Title:</b>  | <input type="text"/>   |
| <b>Surname:</b>  | <input type="text"/>   |
| <b>Forename/s (in full):</b>   | <input type="text"/>   |
| <b>Date of birth</b>   | <input type="text"/> <b>Intended Retirement Age</b> <input type="text"/> |
| <b>Country of birth</b>  | <input type="text"/>   |
| <b>Sex</b>   | <input type="text"/>   |
| <b>Marital status:</b>   | <input type="text"/>   |
| <b>Spouse's / partner's name:</b>  | <input type="text"/>   |
| <b>Spouse's / partner's date of birth</b>  | <input type="text"/>   |
| <b>Permanent residential address</b><br>including postcode:                                    | <input type="text"/>   |
| <b>Date moved to this address:</b>   | <input type="text"/>   |
| If you have lived there for less than three years, your previous permanent residential address | <input type="text"/>   |
| <b>Contact numbers:</b>  | Home: <input type="text"/>   |
|  | Office: <input type="text"/>   |
|  | Mobile: <input type="text"/>   |
| <b>Email address:</b>  | <input type="text"/>   |
| <b>National Insurance Number:</b>  | <input type="text"/>   |
| <b>Unique Tax Reference Number</b>   | <input type="text"/>   |

## 2 Status

In order to ascertain your clients membership status, please tick ONE of the following:

- 1. Employed persons.** A person chargeable to tax under Chapter 2 of Part 2 of the Income Tax (Earnings and Pensions) Act 2003 for the tax year concerned in respect of employment income as defined in the Act.
- 2. Pensioners.** A person chargeable to tax under Part 9 of The Income Tax (Earnings and Pensions) Act 2003 for the tax year concerned in respect of a pension.
- 3. Self employed persons.** A person chargeable to tax under Chapter 2 of Part 2 of the Income Tax (Trading and Other Income) Act 2005 for the tax year concerned in respect of annual profits or gains arising or accruing from any trade, profession or vocation carried on by an individual.
- 4. Children.** A child under 16. (**SSAS members must be over the age of 18**)
- 5. Any others not falling in 1, 2, 3 or 4 above**
  - Caring for one or more children aged under 16.  Caring for a person aged 16 or over.
  - In full-time education.  Unemployed.
  - Other  Full details

**Employment details** If you have ticked either Box 1 or Box 3 on the previous page, please give the full name and address of your client's employer if employed, or your trading details if they are self employed.

**Job title/occupation:**

**Earnings/profits in current tax year:**

**Date Money Purchase AA applicable**

### 3 Your lifetime allowance

I have the following type(s) of lifetime allowance protection or enhancements, if any apply please provide a copy of the certificate along with this application:

|   |  |  |
|---|--|--|
| <input type="checkbox"/> <b>1. Enhanced protection</b>        | My certificate reference number is                           | <div style="background-color: #e6e6fa; height: 20px;"></div> |
| <input type="checkbox"/> <b>2. Primary protection</b>         | Uncrystallised lump sum rights on 5 <sup>th</sup> April 2006 | <div style="background-color: #e6e6fa; height: 20px;"></div> |
|   | My certificate reference number is                           | <div style="background-color: #e6e6fa; height: 20px;"></div> |
|   | Primary protection factor                                    | <div style="background-color: #e6e6fa; height: 20px;"></div> |
| <input type="checkbox"/> <b>3. Fixed protection 2012</b>      | My certificate reference number is                           | <div style="background-color: #e6e6fa; height: 20px;"></div> |
| <input type="checkbox"/> <b>4. Fixed protection 2014</b>      | My certificate reference number is                           | <div style="background-color: #e6e6fa; height: 20px;"></div> |
| <input type="checkbox"/> <b>5. Individual protection 2014</b> | My certificate reference number is                           | <div style="background-color: #e6e6fa; height: 20px;"></div> |
| <input type="checkbox"/> <b>6. Fixed protection 2016</b>      | My certificate reference number is                           | <div style="background-color: #e6e6fa; height: 20px;"></div> |
| <input type="checkbox"/> <b>7. Individual protection 2016</b> | My certificate reference number is                           | <div style="background-color: #e6e6fa; height: 20px;"></div> |
| <input type="checkbox"/> <b>8. Pension credit factor</b>      | My certificate reference number is                           | <div style="background-color: #e6e6fa; height: 20px;"></div> |
| <input type="checkbox"/> <b>9. International enhancement</b>  | My certificate reference number is                           | <div style="background-color: #e6e6fa; height: 20px;"></div> |

### 4 Contributions

|                                      |  |                  |  |                |
|--------------------------------------|--|------------------|--|----------------|
| <b>Regular contributions</b>         | £ <div style="background-color: #e6e6fa; width: 100px; height: 20px;"></div> | Member (net)     | £ <div style="background-color: #e6e6fa; width: 100px; height: 20px;"></div> | Member (gross) |
|                                      | £ <div style="background-color: #e6e6fa; width: 100px; height: 20px;"></div> | Employer (gross) |  |                |
| <b>This will be paid (Frequency)</b> | <div style="background-color: #e6e6fa; height: 20px;"></div>                 |                  |  |                |
| <b>Single contributions</b>          | £ <div style="background-color: #e6e6fa; width: 100px; height: 20px;"></div> | Member (net)     | £ <div style="background-color: #e6e6fa; width: 100px; height: 20px;"></div> | Member (gross) |
|                                      | £ <div style="background-color: #e6e6fa; width: 100px; height: 20px;"></div> | Employer (gross) |  |                |

## 5 Details of transferring schemes

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**Company/Scheme name:**

Policy number(s)/Scheme Reference:

Type of Scheme, tick one:

Personal pension

Defined contribution occupational

Defined benefit occupational

Section 32 buyout

Does this comprise of the full plan value?  Yes  No

Are the funds crystallised?  No  Partially  Fully

Transfer value (or estimate):

Transfer will be made: (tick one)

in cash

in specie

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**Company/Scheme name:**

Policy number(s)/Scheme Reference:

Type of Scheme, tick one:

Personal pension

Defined contribution occupational

Defined benefit occupational

Section 32 buyout

Does this comprise of the full plan value?  Yes  No

Are the funds crystallised?  No  Partially  Fully

Transfer value (or estimate):

Transfer will be made: (tick one)

in cash

in specie

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Policy number(s)/Scheme Reference:

Type of Scheme, tick one:

Personal pension

Defined contribution occupational

Defined benefit occupational

Section 32 buyout

Does this comprise of the full plan value?  Yes  No

Are the funds crystallised?  No  Partially  Fully

Transfer value (or estimate):

Transfer will be made: (tick one)

in cash

in specie

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## GENERAL DATA PROTECTION REGULATION

Talbot and Muir will collect store and process data you have provided on this application. We will use this information to enable us administer your SSAS. This data will be digitally stored, which includes storage on our back office system provided by Delta Financial Services and on our digital document storage system provided Rekon Software. The data we collect from you or is provided to us by a third party is required to enable us to provide the services you have requested or otherwise to fulfil our legitimate interests, and is processed in accordance with our Privacy Notice. The data will be retained throughout the length of the contract and thereafter for so long as we can lawfully justify holding it. Please refer to our Privacy Notice accessible at <https://www.talbotmuir.co.uk/privacy-notice/> for further details.

## DECLARATION

(please tick each box  and sign below)

I hereby confirm that I have read and understood the Privacy Notice and that I understand that Talbot and Muir and the corporate trustee will obtain, record, process and hold my information and other such personal data as may be required to administer my pension benefits in the SSAS in accordance with General Data Protection Regulation (GDPR).

I also understand that Talbot and Muir may disclose to a third party such information about me as may be required by that third party to enable them to trace my whereabouts in the future should they be unable to do so and require their assistance.

Where I have disclosed personal data relating to other individuals, I also confirm that, as agent, on behalf of those individuals, I have the right to give that personal data to you on their behalf; and that I have informed them that I have given their information to you and have provided them with a link to your Privacy Notice (or a copy of it).

Signed :

Date :

talbotandmuir

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Talbot and Muir Limited provides administration to Small Self Administered Pension Schemes and is authorised by and regulated by the Financial Conduct Authority to provide administration to Self Invested Personal Pensions.

Talbot and Muir is the trading name for Talbot and Muir Limited (company number 02869547), registered in England, registered address 55 Maid Marian Way, Nottingham, NG1 6GE. A list of directors is available upon request.

SSAS New member Q02-July 2019