

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.

Failure to provide and complete the full correct information may result in a delay in processing/registering the pension scheme with HMRC or could result in the application being rejected.

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

Title:	<input type="text"/>
Surname:	<input type="text"/>
Forenames (in full):	<input type="text"/>
Date of birth:	<input type="text"/>
Place/Country of birth:	<input type="text"/>
Intended Retirement Age	<input type="text"/>
Nationality:	<input type="text"/>
Sex:	<input type="text"/>
Marital status:	<input type="text"/>
Spouse's/partner's name:	<input type="text"/>
Spouse's/partner's date of birth:	<input type="text"/>
Permanent residential address:	<input type="text"/>
Post code:	<input type="text"/>
Date moved to this address:	<input type="text"/>
If you have lived there for less than three years, your previous permanent residential address:	<input type="text"/>
Phone number:	<input type="text"/>
Mobile number:	<input type="text"/>
Email address:	<input type="text"/>
National Insurance number:	<input type="text"/>
Do you have a Self -Assessment UTR?	<input type="checkbox"/> Yes <input type="checkbox"/> No
If no, please provide reason:	<input type="text"/>
If yes, please enter UTR number:	<input type="text"/>

2 Status

In order to ascertain your 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 vacation carried out by an individual.
- 4. Children.** A child under 16. (SSAS members must be over the age of 18)
- 5. Any others** not falling **1, 2, 3 or 4** above, please select below

- | | | | |
|---|--------------------------|-------------------------------------|--------------------------|
| Caring for one or more children aged under 16 | <input type="checkbox"/> | Caring for a person aged 16 or over | <input type="checkbox"/> |
| In full-time education | <input type="checkbox"/> | Unemployed | <input type="checkbox"/> |
| Retired | <input type="checkbox"/> | Other | <input type="checkbox"/> |

If other, please provide details

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

Employer's name:	<div style="background-color: #e0e0e0; height: 20px;"></div>
Nature of Business:	<div style="background-color: #e0e0e0; height: 20px;"></div>
Employer's address:	<div style="background-color: #e0e0e0; height: 40px;"></div>
Post code:	<div style="background-color: #e0e0e0; height: 20px;"></div>
Office number:	<div style="background-color: #e0e0e0; height: 20px;"></div>
Job title/occupation:	<div style="background-color: #e0e0e0; height: 20px;"></div>
Date employment commenced:	<div style="background-color: #e0e0e0; height: 20px;"></div>
Date joined this scheme:	<div style="background-color: #e0e0e0; height: 20px;"></div>
Earnings/profits in current tax year:	<div style="background-color: #e0e0e0; height: 20px;"></div>

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"/>	1. Transitional Tax Free Amount Certificate		
<input type="checkbox"/>	2. Enhanced protection	My certificate reference number is	<input type="text"/>
<input type="checkbox"/>	3. Primary protection	Uncrystallised lump sum rights on 5 April 2006	<input type="text"/>
		My certificate reference number is	<input type="text"/>
		Primary protection factor	<input type="text"/>
<input type="checkbox"/>	4. Fixed Protection 2012	My certificate reference number is	<input type="text"/>
<input type="checkbox"/>	5. Fixed Protection 2014	My certificate reference number is	<input type="text"/>
<input type="checkbox"/>	6. Individual protection 2014	My certificate reference number is	<input type="text"/>
<input type="checkbox"/>	7. Fixed Protection 2016	My certificate reference number is	<input type="text"/>
<input type="checkbox"/>	8. Individual Protection 2016	My certificate reference number is	<input type="text"/>
<input type="checkbox"/>	9. Pension credit factor	My certificate reference number is	<input type="text"/>
<input type="checkbox"/>	10. International enhancement	My certificate reference number is	<input type="text"/>

4 Contributions

Do you wish to make contributions? Yes No

Regular contributions	£ <input type="text"/>	Member (net)	£ <input type="text"/>	Member (gross)
Employer contributions	£ <input type="text"/>	Employer (gross)		
This will be paid (Frequency)	<input type="text"/>			
Single contributions	£ <input type="text"/>	Member (net)	£ <input type="text"/>	Member (gross)
Employer contributions	£ <input type="text"/>	Employer (gross)		

Date Money Purchase AA* applicable

*Money Purchase Annual Allowance (AA) is £10,000. It is applicable if you access any pension arrangement under Flexi-access Drawdown and take an income or you received an uncrystallised funds pension lump sum.

5 Details of Transferring Schemes

Transfer One - Company/Scheme name:

Policy number(s)/Scheme Reference:

Address:

Postcode:

Name of contact:

Telephone number:

Email address:

Type of Scheme, (tick one): Personal Pension occupational Defined contribution occupational Defined benefit occupational Section 32 buyout Other

If 'Other' please complete details:

Does this comprise of the full plan value? Yes No

Are the funds crystallised? (tick one) No Partially Fully

Transfer value (or estimate):

Transfer will be made (tick one) in cash in specie

Does this transfer have a protected pension age? Yes No If these boxes are left blank we will assume the answer is no.

Transfer Two - Company/Scheme name:

Policy number(s)/Scheme Reference:

Address:

Postcode:

Name of contact:

Telephone number:

Email address:

Type of Scheme, (tick one): Personal Pension Defined contribution occupational Defined benefit occupational Section 32 buyout

Other

If 'Other' please complete details:

Does this comprise of the full plan value? Yes No

Are the funds crystallised? (tick one) No Partially Fully

Transfer value (or estimate):

Transfer will be made (tick one) in cash in-specie

Does this transfer have a protected pension age? Yes No If these boxes are left blank we will assume the answer is no.

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 Virtual Cabinet Ltd. 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

To be completed by the sponsoring employer/trustee. (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 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 disclose 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 provided them with a link to your Privacy Notice (or a copy of it).

If you experience difficulties accessing any of our services due to personal circumstances, we may be able to make some adjustments to help you. Please provide us with details of your needs so we can assess any reasonable adjustments that we can make for you.

The information you provide will help us assess your requirements and make any reasonable adjustments to improve how we work and communicate with you.

We will require your express consent to process this information, and to enable us to share this data with other third parties where appropriate, e.g. investment firms or advisers, to help us, and others to continue to meet your needs. Please could you kindly provide this below.

I agree to my information being processed by Talbot and Muir Ltd, to include being shared and gathered between relevant third parties.

Please refer to our Privacy Notice, should you require further guidance on how we will collect use and protect your personal information. This can be found on our website www.talbotmuir.co.uk or please ask your adviser or us for a copy.

Your consent to share personal information is entirely voluntary and you may withdraw your consent at any time. Should you have any questions about this process, or wish to withdraw your consent please contact our Admin Department on 0115 841 5000 or via email at customer.support@talbotmuir.co.uk

Signed:
Name:

Date:

talbotandmuir

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Nottingham
NG1 6GE
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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 Dunn's House, St Paul's Road, Salisbury, SP2 7BF. A list of directors is available upon request.

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