

SSAS New Employer Application

- For a new Principal or Participating Employer of an existing scheme.
- This form should be completed and signed by the Employer.
- Please complete this document in full and ensure it is accompanied by evidence of identity for the company.

This document, together with the governing Trust Deed and Rules forms a legally binding agreement between you and us.

1. Scheme Details

Scheme Name

New Principal Employer

New Participating Employer

Note: Please tick one only

2. Employer Details

Company Name

Registered Office Address

Contact Name

Contact Telephone Number

Contact Email Address

Employer Status

Company Registered Number

Trading Year End

Nature of Business

Corporation tax Reference

VAT Reference

PAYE Reference

Note: Where an Adviser is appointed we will send all correspondence to them. Otherwise we will send all correspondence to the company contact.

Note: Whether limited, limited by guarantee, unlimited, limited liability partnership or other.

Number of Employees

Relationship to current Principal Employer

Note: Whether common shareholders or directors etc.

3. Company Accountant

Company Name

Address

Contact Name

Contact Telephone Number

Contact Email Address

Note: Please provide details of the principal or participating employer's accountant.

4. Proposed Contributions

Member Name	Initial Contribution		
	£	or	%
	£	or	%
	£	or	%
	£	or	%
	£	or	%
	£	or	%
	£	or	%
	£	or	%
	£	or	%
	£	or	%
	£	or	%
	£	or	%
	£	or	%
Total	£	or	%

Note: Please confirm the amount of contribution to be paid for each member.

Note: If a member has benefits which are subject to enhanced or fixed protection, the protection will be lost if a contribution is paid by/for them.

5. Declarations

- On behalf of the Employer named above we agree to participate in the above named pension scheme.
- We confirm we are acting in accordance with the Memorandum and Articles of Association of the Company or Partnership Agreement.
- We request Whitehall to provide the necessary documentation for the Employer to participate in the Scheme.
- We agree to Whitehall Trustees Limited acting as Trustee and providing administration services to the Scheme.
- This document, together with any supplementary information provided by us or our Advisers or representatives provides you with the information required to administer our self-administered scheme. It also gives you essential information for regulatory purposes.
- We confirm we understand that once a contribution has been made to a Scheme, it cannot be returned without incurring a tax charge.
- We request the Scheme Administrator to issue such documents and provide appropriate benefits as may be required from time to time.
- We confirm that we have the necessary capacity and authority to enter into this agreement.
- We acknowledge that we are aware of the risk factors of entering into a SSAS.
- We have read and understood the Schedule of Fees, Trust Deed and Rules and agree to the information and conditions set out in these documents.
- We agree to be bound by the declarations below regarding the Data Protection Act.
- We agree to the Adviser's fees as already agreed by the Member Trustees being paid from the SSAS fund.
- Every statement made in this application is to the best of our knowledge and belief, true and complete.

Data Protection Act

We understand and agree that:

- Information about our SSAS will be held by Whitehall Group (UK) Limited and Whitehall Trustees Limited for business analysis, fraud prevention and to keep accurate and up to date records.
- Under the Data Protection Act, we can ask to see a copy of the personal information held about us by writing to Whitehall at your usual address. We understand that this will involve the payment of a fee.
- Where we act as Data Controllers, we will register under the terms of the Data Protection Act.
- Information will be held after you no longer act for us. Any information will be held in the strictest confidence and is subject to the provisions of Data Protection legislation.

It is a serious offence to make false statements.

6. Signatures

Print Name

Signature

Director/Secretary

Director/Secretary

Note: Two directors or a director and company secretary to sign on behalf of the Employer.

Date

7. To Proceed – Introducing a New Employer

New Employer Application

Trust Deed

Anti-Money Laundering Evidence of Identity

✓

Note: To comply with the requirements of the Anti-Money Laundering Regulations.

Certified copies of the Certificates of Incorporation, last set of audited accounts and most recent Company Returns for the Employer

Please correspond with us



enquiries@whitehallgroup.co.uk



Whitehall Group (UK) Ltd
8-10 Bolton Street
Ramsbottom
BL0 9HX



03302 232300

Whitehall is the trading name of:

Whitehall Group (UK) Limited, a company registered in England and Wales (Registered number 07625300), Whitehall Trustees Limited, a company registered in England and Wales (Registered number 07625294) and Whitehall Corporate Limited, a company registered in England and Wales (Registered number 7759590). All three companies have their registered office at 8-10 Bolton Street, Ramsbottom, BL0 9HX.

