



WHITEHALL

whitehallgroup.co.uk

SSAS Appointment & Acceptance of Scheme Administrator

1. Notes

1. To establish a new SSAS or take over an existing SSAS. This form should be completed and signed by the Principal Establishing Employer (if still in existence) and the member trustees.
2. If you have any questions about the completion of this form, please contact us at enquiries@whitehallgroup.co.uk or telephone 03302 232300.
3. Please return the completed form to us at our address below.

2. Appointment

Pension Scheme Name

Note: Please give the full name as showing on the trust deed(s).

- On behalf of the establishing employer we hereby agree to appoint Whitehall SSAS Trustees Limited as Trustee and Scheme Administrator of the Scheme as defined in the Finance Act 2004.
- As Trustees of the Scheme we hereby agree to appoint Whitehall SSAS Trustees Limited as Trustee and Scheme Administrator of the Scheme as defined in the Finance Act 2004.
- We confirm that we have the necessary capacity and authority to enter into this agreement.

3. Principal Employer's Signature (If no employer is associated to the Scheme please leave blank)

Your Name

Your Signature

For and on Behalf of
(company name)

Your Position within the
Business

Witness Name

Witness Signature

Witness Address

Witness Occupation

Date

4. Member Trustees' Signature(s)

Member Name

Member Signature

Date

5. Acceptance

We hereby accept the appointment as a Trustee and Scheme Administrator of the above pension scheme.

Your Name

Your Signature

For and on Behalf of
(company name)

Whitehall SSAS Trustees Limited

Your Position within the Business	
Witness Name	
Witness Signature	
Witness Address	
Witness Occupation	
Date	

Please Return this form to:

Whitehall Group
8-10 Bolton Street
Ramsbottom
BL0 9HX

Telephone: 03302 232300

Email: enquiries@whitehallgroup.co.uk



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), Whitehall Corporate Limited, a company registered in England and Wales (Registered number 07759590), Whitehall Group SSAS Limited, a company registered in England and Wales (Registered number 16369001), Whitehall SSAS Trustees Limited, a company registered in England and Wales (Registered number 16368970), Whitehall Group SIPP Limited, a company registered in England and Wales (Registered number 13577749) and Whitehall SIPP Trustees Limited, a company registered in England and Wales (Registered number 13587700). All companies have their registered office at 8-10 Bolton Street, Ramsbottom, BL0 9HX.

Whitehall Group SIPP Limited is authorised and regulated by the Financial Conduct Authority (FCA) firm reference number 978183.