



SEGMENTED SOLUTIONS LTD

SPONSORING EMPLOYER APPLICATION

SEPTEMBER 2021

SSAS SPONSORING EMPLOYER APPLICATION

Scheme Name:	
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Avoid calling it the “ABC Ltd SSAS” as the Bank Account name might get reduced to “ABC Ltd” which gets confusing. Much better to be: The ABC SSAS or The ABC Pension Scheme.

Sponsoring Employer Name:	
Registration Number:	
VAT Number:	
PAYE Reference: <i>(123/A56789 or 123/AB56789)</i>	
Corporation Tax Reference: <i>(10-digit number)</i>	
Registered Office Address: <i>(If at this address for less than 12 months, please add a note of your previous address)</i>	
Trading Address: <i>(If at this address for less than 12 months, please add a note of your previous address)</i>	
Nature of business:	
Number of Employees:	
Contact Name/Position:	
Contact Tel Number/Email:	

SPONSORING EMPLOYER TRADING HISTORY & PLANS:

When is your Company Year-End?	
What were the trading profits for the Previous Year?	£
What are your expected Trading Profits for the Current Year?	£
Does any of your work fall under the “Research & Development” Regime in order for an R&D claim to be submitted for you. If so – please describe the relevant activities here.	
How are the Shares in the Sponsoring Employer held? (Please show % Ownership for each Individual/Company/Trust)	
What is the ‘EXIT’ Plan for the Business – in terms of a SALE or SUCCESSION to the next generation? If there is none, please say so.	

DIRECTOR/PARTNER DETAILS (Please Provide Details for ALL Directors/Partners):

1 st Director/Partner Name:	
Date of Birth: (DD/MM/YYYY)	
NI Number:	
Unique Tax Reference (UTR): <i>(10 Digits, sometimes with a K on the end. If you do not have 1 then add a note as to why)</i>	
Residential Address: <i>(If at this address for less than 12 months, please add a note of your previous address)</i>	
Telephone/Email:	

2 nd Director/Partner Name:	
Date of Birth: (DD/MM/YYYY)	
NI Number:	
Unique Tax Reference (UTR): <i>(10 Digits, sometimes with a K on the end. If you do not have 1 then add a note as to why)</i>	
Residential Address: <i>(If at this address for less than 12 months, please add a note of your previous address)</i>	
Telephone/Email:	

DIRECTOR/PARTNER DETAILS CONT:

3rd Director/Partner Name:	
Date of Birth: (DD/MM/YYYY)	
NI Number:	
Unique Tax Reference (UTR): <i>(10 Digits, sometimes with a K on the end. If you do not have 1 then add a note as to why)</i>	
Residential Address: <i>(If at this address for less than 12 months, please add a note of your previous address)</i>	
Telephone/Email:	

4th Director/Partner Name:	
Date of Birth: (DD/MM/YYYY)	
NI Number:	
Unique Tax Reference (UTR): <i>(10 Digits, sometimes with a K on the end. If you do not have 1 then add a note as to why)</i>	
Residential Address: <i>(If at this address for less than 12 months, please add a note of your previous address)</i>	
Telephone/Email:	

(Where there are more than 4 Directors/Partners, please copy this page)

SSAS FUNDING & INVESTMENT SUMMARY

Please indicate how you expect your SSAS will be funded over the next 12 months:

Intended Cash Contributions:	£
Intended In-Specie Property Contribution:	£
Expected Pension Transfers:	£
Approximate SSAS Value 12 months from now:	£

How will the SSAS' Funds be Invested?

Will the SSAS be investing in commercial property or land?	YES/NO
If 'YES' – please provide a brief summary:	

Will the SSAS be making any loans?	YES/NO
If 'YES' – please provide a brief summary:	

Will the SSAS be investing in unlisted securities?	YES/NO
If 'YES' – please provide a brief summary:	

Other than cash deposits, will the SSAS be investing into anything else?	YES/NO
If 'YES' – please provide a brief summary:	

NOTES SECTION:
Where current addresses are less than 12 months old, or where a Director/Partner has no UTR, or for anything else, please add your notes here:

Once completed, please scan and email this form to:

SSAS@segmentedsolutions.co.uk

Also send an original in the post, the postal address is:

Segmented Solutions Ltd

The Mansley Business Centre

Timothy's Bridge Road

Stratford Upon Avon

Warwickshire

CV37 9NQ

If you have any questions, please email as above or call our technical support on:

07786 396722 or 01789 638 046

Please note:

All Research & Development (R&D) work is carried out by our Partner Company, Elite Wealth Services (Taxation) Ltd.

<https://www.elitewealthservices.com>

All exit planning involving a sale to a Corporate Trust or the creation of an Employee Ownership Trust (EOT) is supported by Anthony Rogers CTA TEP at Fusion Partners LLP.

<https://fusionpartners.co.uk/>