



**SEGMENTED SOLUTIONS LTD**

**SPONSORING EMPLOYER APPLICATION**

**MAY 2023**

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## SSAS SPONSORING EMPLOYER APPLICATION

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Please **TYPE** your answers into this form and email a digital copy to us before printing the final version which you will need to post to us. Also – please double check HMRC has the **SAME** information, such as **ADDRESS** (Moved recently?) and **NAME** (Married recently?) as these are sometimes out of date with HMRC and can result in your Application being rejected.

Scheme Name:	
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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>	
Nature of business:	
Number of Employees:	
Contact Name/Position:	
Contact Tel Number & Email:	

## SCHEME MEMBERSHIP

How many Members are Proposed at outset?	
If more than 1 Member is planned at outset – please clarify any relationships between the Members, such as Spouse, Child, Brother/Sister etc	

## 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?	£
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 <sup>st</sup> 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 <sup>nd</sup> 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:**

3 <sup>rd</sup> 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:	

4 <sup>th</sup> 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?

<b>Commercial property or land? (YES or NO)</b>	
If 'YES' – please provide a brief summary:	

<b>Will the SSAS be making any loans? (YES or NO)</b>	
If 'YES' – please provide a brief summary:	

<b>Will the SSAS be investing in unlisted securities? (YES or NO)</b>	
If 'YES' – please provide a brief summary:	

<b>Will the SSAS be investing into anything else? (Yes or NO)</b>	
If 'YES' – please provide a brief summary:	

<b>NOTES SECTION:</b>
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 email this form to:**

[SSAS@segmentedsolutions.co.uk](mailto: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