



SEGMENTED SOLUTIONS LTD

APPOINTMENT OF PRACTITIONER

JULY 2025

SSAS PRACTITIONER APPLICATION

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 as these are sometimes out of date with HMRC and can result in your Application being rejected.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: Please confirm if name at Companies House is 'LTD' or 'LIMITED'	Date of Incorporation:
Registration Number:	
VAT Number (if applicable):	
PAYE Reference: (123/A56789 or 123/AB56789)	If you have not applied for one – please say NONE
Corporation Tax Reference:	This is a 10 digit number that will be found on all letters from HMRC
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 AND Email:	

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 AND 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 AND Email:	

DIRECTOR/PARTNER DETAILS CONT:

3 rd 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 AND Email:	

4 th 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 AND Email:	

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

SCHEME DETAILS:	
PSTR Number & Date of Issue:	
Scheme Administrator Name:	
Scheme Administrator ID:	
Professional/Corporate Trustee(s) Name/Address: <i>If applicable, they will either have to be removed, or they will have to confirm that they will be happy to sign and accept our appointment as Scheme Practitioner.</i>	

SSAS FUNDING & INVESTMENT SUMMARY

How are the current SSAS Funds Invested?

<p>Please provide a detailed summary, to include a full Contributions & Transfers Summary and how Contributions have been allocated to Individual Members. Where loans exist, please provide details too. If you have all this information within an existing Spreadsheet, please add a note and email us the spreadsheet instead.</p>

Which Bank does your SSAS use?	
Are there regular monthly Standing Orders or recurring payments being made from this account (An example would be for PAYE payments to any Members).	If YES – please provide some details as to what these are for.

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

Additional Contributions:	£
Additional Pension Transfers:	£
Approximate SSAS Value 12 months from now:	£

How will New and Existing Cash Balances be Invested?

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

Will the SSAS be making any new 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 ...and to give us a picture of what you have planned for your SSAS in the coming 12/24 months, please add additional notes here:

Once completed and before you print it out, please 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:

Direct Dial: 01789 614 266