

SSAS

Additional directors

Notes for completing this application form

This form is to be completed by any Director of the Principal Employer who will not become a member of the scheme.

In order to register the scheme with HMRC, we are required to submit details of all Directors of the Principal Employer. If this information is not provided, it may lead to delays to the registration of the scheme.

If you have any queries whatsoever in relation to the completion of this form, then you should contact your adviser or AJ Bell Business Solutions Limited at:

AJ Bell Platinum, 4 Exchange Quay, Salford Quays, Manchester M5 3EE
 Telephone number: 0345 25 05 610
 Fax: 0345 40 89 200
 Website: ajbellplatinum.co.uk
 Email: platinumssas@ajbell.co.uk

Please use BLOCK CAPITALS only and blue or black ink, ticking boxes where appropriate.

If you would like a copy of this, or any other item of our literature, in large print, Braille or audio format, please contact us on 0345 25 05 610 or by email at platinumssas@ajbell.co.uk.

ADDITIONAL DIRECTORS: to be completed by any Director of the Principal Employer who will not become a member.

Scheme name

1. Personal details

Is this individual a Person of Significant Control ("PSC")? Yes No

Title Surname

Forename(s) (in full)

Date of birth Sex

National Insurance number Unique Tax reference number *This is quoted on your self-assessment tax return

Marital status

Permanent residential address

Postcode

Resident at current address since

 (insert date)

If you have lived at your permanent residential address for less than three years, please provide your previous permanent residential address.

Previous permanent residential address

Postcode

Please provide details of all nationalities below.

Nationality 1

Nationality 2 (if applicable)

Nationality 3 (if applicable)

2. General declaration

General Declaration

I declare that the information provided in this application form is to the best of my knowledge and belief, correct and complete.

Data privacy statement

We'll use the information you provide to check your identity with credit reference and fraud prevention agencies. These agencies will record our checks and will make that record available so others are able to verify your identity.

So we can thoroughly check the available data, we verify your identity using scoring methods. If you supply false or inaccurate information and we suspect fraud, we'll inform the fraud prevention agencies.

If we can't verify your identity by electronic means, we may ask for additional information.

We will also verify information against Companies House records. Where information provided on the form differs from the information held by Companies House, we may request evidence to support the extent of control the person / entity listed has over the company. Where discrepancies are identified between the information provided on the form and the information held by Companies House, we may be obliged to report these discrepancies to Companies House. Any missing information will mean that the application process is delayed.

Depending how the data has been processed, and subject to some exemptions, you have a number of legal rights concerning your personal information. These include the right to:

- access personal information;
- rectify / erase personal information;

- restrict the processing of your personal information;
- transfer your personal information;
- object to the processing of personal information;
- object to how we use your personal information for direct marketing purposes;
- obtain a copy of personal information safeguards used for transfers outside your jurisdiction; and
- lodge a complaint with your local supervisory authority.

Signature

Date

Name

Signed in my capacity as a Director of the Principal Employer to the scheme.

Please sign and date this application and return it to AJ Bell Platinum, 4 Exchange Quay, Salford Quays, Manchester M5 3EE.