

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

Title	Surname
<input type="text" value="Dr/Mr/Mrs/Miss/Ms/Other"/>	<input type="text"/>
Forename(s) (in full)	
<input type="text"/>	
Date of birth	Sex
<input type="text"/>	<input type="text" value="Male/Female"/>
National Insurance number	Unique Tax reference number *This is quoted on your self-assessment tax return
<input type="text"/>	<input type="text"/>
Marital status	
<input type="text" value="Married/Single/Divorced/Widowed/Civil partner"/>	

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

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 register the pension scheme with Her Majesty's Revenue and Customs (HMRC).

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

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

To exercise these rights, please contact us. For more information, see our privacy policy on ajbellplatinum.co.uk.

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.