



InvestAcc
PENSION
ADMINISTRATION LTD

Small Self-Administered Scheme

SSAS

New Member Application

New member information

SSAS scheme name

Personal details

Title	Forename(s)		
Surname			
Current home address			
			Postcode
Previous home address (if less than 12 months at current address above)			
			Postcode
National insurance number		HMRC Unique Tax Reference (UTR)	
Mobile phone number		Phone number (office hours)	
Date of birth (DD/MM/YY)		Email address	
Date of joining company (DD/MM/YY)		Normal retirement age (55 to 75)* State Pension Age will be assumed if left blank.	

*Note that the normal minimum pension age increases from 55 to 57 on 6 April 2028.

Marital status

Single
 Married
 Divorced
 Widowed
 Civil partnership

Is the member a director of the sponsoring employer or a participating employer?

Yes
 No
 Shareholding %

Spouse details

Full name of spouse
Spouse's date of birth (DD/MM/YY)

Proposed contributions

Monthly
 Annual
 Single

Transfers Are you going to transfer your benefits under one or more registered pension schemes into this scheme?

If Yes, please complete the following information. You must also complete a separate ceding scheme Transfer Form for each transfer along with our SSAS Transfer In Form.

Number of transfers to be made?	Number of in-specie transfers? (transfer of existing assets)	Approx. value <input type="text" value="£"/>
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Nomination of beneficiaries

Member full name

If you wish to nominate who you would like to receive any death benefits in the event of your death, please complete the section below. If the following instructions do not fully reflect your wishes, then you can download and complete a more tailored nomination of beneficiaries form which is available on our website.

I would like the trustees to consider distributing any benefits payable on my death to the following, in the proportions shown:

Beneficiary full name	Relationship	%
Beneficiary full name	Relationship	%
Beneficiary full name	Relationship	%
Beneficiary full name	Relationship	%

Total

I understand that the above is not legally binding, and that distribution of death benefits is at the discretion of the trustees of the scheme.

Should you wish to alter this nomination in the future, you can download a fresh nomination of beneficiaries from our website or contact us to arrange for an appropriate form.

Declaration

I hereby apply to become a member of the pension scheme referred to above and I agree to be bound by the Trust Deed and Rules, as amended from time to time. I declare that the information provided in this application form, and any other documents completed in connection with this application, is to the best of my knowledge and belief, correct and complete.

I also confirm I have read the latest InvestAcc SSAS Terms and Conditions document and by signing this application form I agree to be liable as a trustee for all fees payable to InvestAcc Pension Administration Limited (InvestAcc), as outlined in the latest version of the 'SSAS - Services and Fees' guide. I understand that InvestAcc may at any time alter its Terms and Conditions and Services and Fees, and that occasionally work may be required that is not covered by the Services and Fees document and may therefore generate additional fees, which would be notified to the trustees in advance of them being incurred.

I understand and agree that InvestAcc will undertake additional checks to verify my identity and residency, and those of related parties such as my employer or anyone making a pension contribution on my behalf. These checks will include online identity verification, which may leave a footprint on my identity records.

Data protection statement

All the information I give to InvestAcc including transactional data, may be shared with and used by the group of companies to which you belong, your associated companies, service providers or agents who may be located in other countries. I understand that you will ensure that my information is only used for the purposes of the Small Self-Administered Pension Scheme of which I am a member and that you will ensure that it is given the levels of protection as required under the UK Data Protection Act 2018.

I agree that my information be used in this way for administration purposes to provide and run the Small Self-Administered Scheme I have applied for and to develop and improve your products and services.

You may also give essential information about me to others if necessary to run my scheme and for regulatory purposes information about me will be kept after my scheme is transferred to another provider or wound up. I understand I have the right to see certain records you hold about me on payment of a fee.

Where relevant, as a trustee I authorise InvestAcc to establish and register the scheme with HMRC on behalf of the trustees.

I confirm that I am able and willing to be appointed as a trustee and that:

- a) I have not been convicted of an offence involving dishonesty or deception.
- b) I am not an undischarged bankrupt.
- c) I have not made an arrangement with creditors which remains undischarged.
- d) I am not currently disqualified as a company director.

I authorise InvestAcc to obtain any information it may require from my employer, any pension provider with which I have benefits, and any other person who may hold information required to administer the scheme.

I understand that if I have given false or inaccurate information and fraud is identified, details will be sent to fraud prevention agencies by InvestAcc. Law enforcement agencies may access and use this information.

Signed in my capacity as a member and trustee.

Signature	Date
Print name	

Anti-Money Laundering Requirements

Applications must be accompanied by certified copies of documents proving the identity and residency of each Trustee. We require two documents (one from each list) from the list below:

List 1

- Current full signed passport
- Current UK driving licence
- EEA Member State ID card
- Firearms certificate or shotgun licence
- Recent evidence of entitlement to state or local authority benefit, pension, tax credit or educational grant

List 2

- Current UK driving licence
- HMRC income tax notice
- Utility bill
- Bank/building society statement
- Mortgage statement
- Credit card statement



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