

SSAS Investment Application

If you would like to make an investment with your SSAS, please complete the following form and send it by email to ssas@investacc.co.uk

Note the requirement of Part 36 of the Pensions Act 1995 that the trustees must obtain professional advice upon the suitability of any investment transaction and consider the need for diversification. That advice must be provided in writing and made available to all the trustees by an expert who is suitably qualified. The adviser must be appointed by all the trustees, including any independent or professional trustee. We reserve the right to refuse any investment for which appropriate advice has not been obtained.

SSAS Name:

Name of investment:

Amount to be invested:

Type of investment (please tick):

- | | | |
|---|---|---------------------------------------|
| <input type="checkbox"/> Bank Account | <input type="checkbox"/> Listed Shares | <input type="checkbox"/> Listed Bonds |
| <input type="checkbox"/> Trustee Investment Plan | <input type="checkbox"/> Discretionary Managed Portfolio | |
| <input type="checkbox"/> Commercial Property/Land | <input type="checkbox"/> Loan to Sponsoring or Participating Employer | |
| <input type="checkbox"/> Structured Product/Deposit | <input type="checkbox"/> General Investment Account | |
| <input type="checkbox"/> Other (please provide details below: | | |

Has an FCA regulated financial adviser or investment adviser provided advice on this investment and the need to diversify the investments?

- Yes No

IMPORTANT - Please provide a copy of the advice provided to the trustees, along with this application.

Declaration by the Managing Trustee(s) of the above pension scheme

I/We confirm that we would like to make the investment noted above.

I/We, acknowledge it is a legal requirement for the trustees to obtain professional advice on any investment transactions to be made (including purchase, sale, switch or transfer of any investments) and to consider appropriate diversification of the investments.

I/We agree that InvestAcc shall not be responsible for any failure to obtain professional advice, any decision which is against professional advice or to ensure appropriate diversification of the investments.

All trustees are required to sign this form.

Managing Trustee Name(s)	Signed	Date

InvestAcc Pension Administration Limited
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