

COMPANY INFORMATION FORM

Use this form to tell Wensley Mackay Ltd about the company establishing the SSAS. This information will allow us to draw up your SSAS Trust Deed. *This form is specifically for limited companies or PLCs.* A separate form is available for partnerships.

We will need details of the company associated with the scheme, and details of the shareholders (if a limited company).

Name of Scheme:	<input type="text"/>
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A COMPANY DETAILS

Name of Principal Company:	<input type="text"/>		
Registered Address:	<input type="text"/>		
	Postcode		
Tel No	<input type="text"/>	Fax No	<input type="text"/>
E-mail Address	<input type="text"/>		
Date Company Established:	<input type="text"/>	Registered No:	<input type="text"/>
Associated Companies:	<input type="text"/>		
Registered Address:	<input type="text"/>		
	Postcode		
Status of Employer: (e.g. Ltd/ Partnership)	<input type="text"/>	Company Year end:	<input type="text"/>
Nature of Business:	<input type="text"/>		
Schedule D Tax District: (Corporation Tax)	<input type="text"/>	Schedule E Tax District (PAYE):	<input type="text"/>

B DIRECTORS/ OWNERS/ SHAREHOLDERS DETAILS

Details of Directors	
<i>Director 1</i>	
Full Name	<input type="text"/>
Permanent Residential Address	<input type="text"/>
	Postcode
<i>Director 2</i>	
Full Name	<input type="text"/>
Permanent Residential Address	<input type="text"/>
	Postcode

Details of Owners or Shareholders who hold over 25% of issued shares

Owner/ Shareholder 1

Full Name

Permanent Residential Address

Postcode

Owner/ Shareholder 2

Full Name

Permanent Residential Address

Postcode

Owner/ Shareholder 3

Full Name

Permanent Residential Address

Postcode

Owner/ Shareholder 4

Full Name

Permanent Residential Address

Postcode

Once you have completed this form, please complete a "Member Information Form" for each person who will be a member of the SSAS. Each member will also be appointed a Trustee of the scheme.

Please forward this form, along with the Member Information Forms, to:

Wensley Mackay Limited, 12 Market Place, Cockermouth, Cumbria. CA13 9NQ