

Small Self Administered Scheme (SSAS)- Requesting the preparation of new scheme documentation

Quick actions:

SSAS form reference H297

You should complete this form if you are a member of a Small Self Administered Scheme (SSAS) and you wish to adopt new Scheme Rules, which Hornbuckle have updated as a result of the new flexible pension reforms to be implemented from 6th April 2015.

Adopting the new rules means that your scheme will be brought in line with the new government legislation and formalise the ability of scheme members to exercise the flexible choice of benefit options open to individuals under the new rules. You will continue to have the same investment flexibility but in addition you will be able to take your benefits in line with the new rules announced in the 2014 Budget, including flexi-access drawdown.

Hornbuckle will also provide you with a new Terms & Conditions document for the Trustees approval.

The preparation of the new Scheme Rules and Trust Deed to formally adopt the rules will be subject to a standard drawing up deeds fee, as detailed in the Hornbuckle SSAS Fee Schedule available at www.hornbuckle.co.uk/key-documents

1. Scheme details

Scheme name

Pension Scheme Tax Reference (PSTR)

2. Member details

First name(s)

Surname

Email

Date of birth

D D M M Y Y

3. Additional Instructions

Please indicate below any additional requirements you have: -

I intend to draw my pension benefits out of my scheme -

Yes No

By way of Flexi Access Drawdown

If yes please complete H206 Benefit Payment form in addition to this request form

By way of Uncrystallised Funds Pension Lump Sum payment

If yes please complete form H299 Uncrystallised Fund Pension Lump Sum form in addition to this request form

I intend to draw a Pension Commencement Lump Sum only

If yes please complete H206 Benefit Payment form in addition to this request form

4. Next steps and your declaration

Please accept this as my instruction to prepare new scheme rules for the above detailed SSAS. Please also prepare the necessary trust deed documentation to allow the scheme to adopt the new scheme rules.

I acknowledge that the preparation of the documentation will be subject to a standard Deed Preparation fee as detailed in the SSAS Fee Schedule.

I acknowledge that in order to adopt the new scheme rules the unanimous agreement of all trustees will be required and that all Trustees of the scheme will be required to sign the trust deed document to effect this change.

I accept responsibility for obtaining the unanimous agreement of all scheme trustees.

Member signature

Date

D D M M Y Y

Print name

Checklist

Before submitting this form please make sure:

You have completed sections 1-4 of this form

Where to send

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Get in touch

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