

Small Self-Administered Scheme

Platinum SSAS

Additional employer form

Notes for completing this application form

If a company, other than the establishing employer, wishes to make contributions to the Scheme for one or more of its employees who are members of the SSAS, it must adhere to the Trust Deed and Rules governing the Scheme.

To enable us to prepare the Deed of Adherence for the company, please complete this form and return it using the details provided below.

If you have any queries whatsoever in relation to the completion of this form, then you should contact your adviser or InvestAcc Platinum:

InvestAcc Platinum

5th Floor, 4 Exchange Quay
Salford Quays
Manchester
M5 3EE

Telephone number: 0345 25 05 610

Email: platinumssas@investacc.co.uk

Digital signatures or electronic signatures

You may be able to complete this form and sign it without the need to print it out, if you have the free Adobe Acrobat Reader with the 'fill and sign' option, which allows you to add a signature. Note that this must clearly be your actual signature, not a handwriting font or similar. We reserve the right to refuse applications or to ask for evidence of signature, such as that on a driving license or passport, or to obtain a traditional wet signature.

We may also accept applications signed using DocuSign or Adobe Sign, but only where an FCA regulated financial advice firm has one of these systems and provides the completed documents, accompanied by the DocuSign Certificate of Completion or Adobe Final Audit Report.

FULL NAME OF SCHEME

Scheme name

New participating employer

Company name	
Registered office	
	Postcode
Main operating address (if different from above)	
	Postcode
Company telephone number	Company fax number
Company email address	
Company accounting date	
Company registered number	Nature of business
Company auditor	
Contact name	
Address	
	Postcode
Telephone number	

We only require the following information if this is a new SSAS.

Number of employees

Is the company registered for tax with HMRC? Yes No

*Please state if the business is not VAT registered

PAYE reference	VAT reference*
Corporate Tax reference	

Details of PSCs

Please provide details of all Persons of Significant Control (“PSC”) below. A PSC is any person with “significant influence or control” over a limited company’s affairs and could include individuals, members of managing bodies and / or other companies. If the company is regulated by the Financial Conduct Authority (“FCA”) or listed on the main market of the London Stock Exchange (“LSE”), you do not need to provide any directors’ details. If a PSC is another company, please provide details using a copy of this form together with details of all PSCs of that company. Please provide a summary list of all PSCs in the table below, and include a structure chart for complex ownership structures, especially where any PSC is another company, including company and FCA registration numbers and LSE ticker code (as applicable).

Name	Name

Structure Chart

Data privacy statement

We’ll use the information you provide to check the identity of anyone whose details you provide in this form with credit reference and fraud prevention agencies. These agencies will record our checks and will make that record available so others are able to verify their identity.

So we can thoroughly check the available data, we verify their identity using scoring methods. If you supply false or inaccurate information and we suspect fraud, we’ll inform the fraud prevention agencies.

If we can’t verify their identity by electronic means, we may ask for additional information.

We will also verify information against Companies House records. Where information provided on the form differs from the information held by Companies House, we may request evidence to support the extent of control the person / entity listed has over the company. Where discrepancies are identified between the information provided on the form and the information held by Companies House, we may be obliged to report these discrepancies to Companies House. Any missing information will mean that the application process is delayed.

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

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

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.

Signature	Date
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X

Name

Signed in my capacity as a Director of the company named above.

Please sign and date this application and return it to:

InvestAcc Platinum

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Salford Quays
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