

Small Self-Administered Scheme

Platinum SSAS

Investment Application

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 platinumssas@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.

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.

SSAS name
Name of investment

Amount to be invested:

£

Type of investment (please tick)

- Bank Account
- Trustee Investment Plan
- Commercial Property/Land
- Structured Product/Deposit
- Listed Shares
- Listed Bonds
- Discretionary Managed Portfolio
- Loan to Sponsoring or Participating Employer
- General Investment Account
- Listed Shares

Other (please provide details below):

Other

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)	Managing Trustee signature	Date
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InvestAcc Platinum

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