



## **ProsperSSAS application form**

By completing this form together with the Trust Deed you agree to appoint Bespoke Pension Management as Scheme Practitioner to your ProsperSSAS Scheme.

You understand that we will assume responsibility of your behalf for the operation of your ProsperSSAS on the basis of the information in the application including preparing suitable documentation to establish the scheme and as may be required from time to time.

### **1. ProsperSSAS details**

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Name of scheme

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Initial number of Member Trustees  
(Each Member will be appointed a Managing Trustee)

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### **2. Principal Employer details**

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Correspondence address

Address line one

Address line two

Town

County

Country

Postcode

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Telephone number

---

Facsimile number

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Email address

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Employer's trade

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Employer's year end

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Registration number

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### **3. Scheme Administrator ID**

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Scheme Administrator ID number

Please note one of the scheme members will need to register as a Scheme Administrator with HMRC at <https://online.hmrc.gov.uk/registration/pensions> and select Pension Schemes for Administrators and then Apply for a Scheme Administrator ID.

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#### 4. Personal details of member

Title MR  MRS  MISS  MS   
*Other please specify*

First name (in full)

Middle name(s)

Surname

Gender Male  Female

Address line one

Address line two

Town

Country

Postcode

Marital status Single  Married  Civil partner   
Separated  Divorced  Widowed

Date of birth (dd/mm/yy)

Occupation

Home telephone number (optional)

Mobile telephone number (optional)

Email address (optional)

National Insurance number

#### 5. Eligibility To Pay Contributions\*

Before accepting contributions to the ProsperSSAS we need to ensure that you are eligible to do so.

Please note that you must be under age 75. All applicants must answer questions 1 and 2 below.

1. Do you have a source of Relevant UK Earnings (i.e. earnings subject to UK tax under Schedule D or Schedule E)? Yes  No

2. Are you resident or ordinarily resident in the UK for tax purposes, or are you a Crown Servant performing duties abroad, or the spouse of such a Crown Servant? Yes  No

\* Note: If you cannot answer Yes to questions 1 and 2 you will not normally be eligible to receive tax relief on contributions above the earnings threshold (currently £3,600 gross). However, there are special circumstances in which this does not apply and you should discuss these with your financial adviser.

## 6. Contribution Details

If the total contribution to all of your UK registered pension schemes exceeds the Annual Allowance penal tax charges may apply. If the total contribution to all of your UK registered pension schemes is in excess of £3,600, personal contributions in excess of your remuneration will not be eligible for tax relief.

**If you have been granted enhanced protection on your existing pensions, it will be lost if any further contributions are made to your ProsperSSAS.**

### Regular Contributions

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By you (*Gross*)\* £

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Frequency Annual  Half-Yearly

Quarterly  Monthly

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By your employer (*gross*) £

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Frequency Annual  Half-Yearly

Quarterly  Monthly

### One-off contributions

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By you (*net of basic rate tax*) £

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By your employer (*gross*) £

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Will your employer deduct your contributions from your salary? Yes  No   
*(if Yes, your employer will need to sign the declaration below and if appropriate complete a standing order instruction)*

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My earnings for this tax year are £

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### Employer's Declaration

- I/We will deduct the necessary contributions from the Applicant's salary after tax and National Insurance have been deducted as they become due, and
- I/We will complete a standing order form and return this to Bespoke Pension Management.

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Signed

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Name

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Position

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Name of Employer

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Dated (*dd/mm/yy*)

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\* Personal contributions are normally paid via your Employer who deducts the amount from your monthly salary. This means you will get immediate tax relief at your highest marginal rate. Employer contributions will be eligible to be treated as a business expense for Corporation Tax purposes subject to meeting the "wholly and exclusively for the purposes of trade" test.

## 7. Transfer of benefits from other registered pension schemes

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Do you wish to arrange for a transfer payment to the ProsperSSAS from an existing registered pension scheme?      Yes       No

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If Yes, please list below the sources of funds you wish to transfer to your ProsperSSAS (continue on a separate sheet if necessary).

Name/ Source of funds	Approximate amount of funds expected
1	£
2	£
3	£
4	£
5	£

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## 8. Benefit Payments

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Do you wish to commence immediate benefit payments from your ProsperSSAS on receipt of all declared transfer payments and contributions?      Yes       No   
*If Yes, please fill in the Benefits Questionnaire form.*

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Are you already in receipt of income from any of the transfer payments identified in section 7?      Yes       No

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## 9. Nomination Of Death Beneficiaries

In the event of my death I would like any sums payable under my ProsperSSAS to be paid to the following person or persons in the manner shown below.

I understand that in exercising your discretion in the disposal of the benefits the Managing Trustees will not be bound by my nominations but you will bear them in mind.

### Nominee A

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Name (*in full*)

Address line one

Address line two

Town

County

Country

Postcode

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Relationship to Applicant and/or extent  
of financial dependence

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Proportion or precedence in which benefit to be paid

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### Nominee B

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Name (*in full*)

Address line one

Address line two

Town

County

Country

Postcode

---

Relationship to Applicant and/or extent  
of financial dependence

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Proportion or precedence in which benefit to be paid

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You may request that either

**A** The benefits would be divided between two or more persons. The proportion which the member would wish each person to receive should be entered appropriately.

**OR**

**B** The benefits should be paid wholly to one person if still alive or to another if the first person has died and so on. The order of precedence should be entered appropriately.

Signature of member ..... Date.....

## 9. Data Protection Notice – Important. Please Read

The personal information you have provided by completing this form will be used by us to set up and service your ProsperSSAS. We may disclose this information to third parties for the purposes of servicing your ProsperSSAS or if we are required to do so by law. We may transfer the personal information we hold about you to another country if necessary for any of the purposes previously described. We will not use this information or disclose it to any third parties for any purposes other than those stated above.

If you have appointed a financial adviser to act on your behalf, we will make details of the contract available to him/her to enable him/her to give you advice.

If you would like to request a copy of the personal data we hold about you, please write to

The Data Protection Co-ordinator  
Bespoke Pension Management  
36 St Georges Wharf  
6 Shad Thames  
London  
SE1 2YS

We do not currently charge for providing this information, but we reserve the right to charge the maximum fee allowed by the (UK) Data Protection Act 1998.

## 10, Principal Employer declarations

### Your Declaration

- 10.1. If this application is accepted we undertake to be bound in all respects by the rules of our ProsperSSAS in force from time to time
- 10.2. We declare that to the best of our knowledge and belief, the statements made in this application are true and complete
- 10.3. We agree to pay your professional fees for your services as agreed between us separately in writing

To be signed by two directors or a director and company secretary of the Principal Employer

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Signed

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Position

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Date

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Signed

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Position

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Date

## Intermediary details

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Title MR  MRS  MISS  MS

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First name (in full)

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Surname

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Name of firm

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FCA Authorisation number

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Address line one

Address line two

Town

County

Postcode

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Signed (*intermediary signature*)

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Dated

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## Checklist of enclosures required

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All Schemes	Enc	To follow
• Bespoke Pension Management Terms of Business	<input type="checkbox"/>	<input type="checkbox"/>
• Bank Account Opening form	<input type="checkbox"/>	<input type="checkbox"/>

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All Scheme Members

• Passport/Certified copy of passport	<input type="checkbox"/>	<input type="checkbox"/>
• Identity Verification Certificate	<input type="checkbox"/>	<input type="checkbox"/>

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Applicants in or going into drawdown

• P45 (if appropriate)	<input type="checkbox"/>	<input type="checkbox"/>
• Benefits Questionnaire	<input type="checkbox"/>	<input type="checkbox"/>

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Applicants expecting third party contributions

• Identity Verification Certificate for source of funds	<input type="checkbox"/>	<input type="checkbox"/>
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Please POST the original application and enclosures to:

**Bespoke Pension Management**  
**36 St Georges' Wharf**  
**6 Shad Thames**  
**London SE1 2YS**