



SSAS Practitioner.com

The SSAS specialist. Lowering fees, enhancing retirement.

SSAS Practitioner.com Fee Agreement

Date of issue :

Scheme name :

The agreement is between the client (the Trustees of the above scheme, or Principal Employer of the above scheme) and SSAS Practitioner.com Limited.

The Agreement is effective from the _____ day of _____ Two thousand and _____ between the Client and SSAS Practitioner.com Limited. The Agreement sets out below the duties to be undertaken by SSAS Practitioner.com Limited following the instruction by the Client to act as practitioner for the above scheme. Fees invoiced to the client are subject to VAT.

The Agreement will remain in force unless and until it is terminated in writing, either by SSAS Practitioner.com Limited or the client, with no notice required, or subsequently replaced by a new Agreement.

In exchange for payment as detailed by this Agreement, SSAS Practitioner.com Limited undertake to provide service to the client as Practitioner to the scheme.

SSAS Practitioner.com

.....

Date:

The Client

.....

Date:

SSAS Practitioner.com, Knighton Place, 72 South Knighton Road, Leicester LE2 3LP

www.SSASPractitioner.com

info@ssaspractitioner.com

Freephone 0800 112 3750

Fax 0116 290 1910

The annual fee of £800 + VAT pa requires SSAS Practitioner.com to conduct the following services. This is not an exhaustive list:

- Provision of Trust Deed and Rules
- Supplying Death Benefit nomination forms
- Scheme registration with HMRC
- Scheme registration with the Pensions Regulator and ongoing correspondence with them
- Registration of the Trustees on the Data Protection Register and ongoing correspondence with them
- Collection of data regarding other pension policies and arranging the transfer of existing policies to the SSAS (no transfer advice given)
- All ongoing liaison with HMRC, event reporting and submission of annual Pension Scheme Return
- Setting up loans from scheme and all associated documentation (not including any solicitors work)
- Liaising with Banks to arrange scheme borrowing
- Set up and payment of tax-free cash and pension from scheme
- Dealing with buying and selling of scheme assets
- Provision of high-quality scheme record keeping
- Payment of death benefits
- Payment of Pensions Regulator and Data Protection invoices (yes, these are also included in our annual fee)
- Provision of annual valuations at the scheme year end, or more frequently if required
- Inclusion of up to four members in the scheme

The only addition charges are for:

- Provision of PAYE if you do not arrange your pension payments through your company payroll (£150 + VAT pa).
- Additional members above four (£150 + VAT pa per extra member)

PAYMENT OF FEES

SSAS Practitioner.com invoice the company or Scheme. If the account is not settled within 90 days of issuing the invoice, we reserve the right to charge interest at 10% pa for fees outstanding by more than 90 days.

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