

A separate form must be completed for each member.

1 Scheme Details

Name of scheme

Scheme Number

2 Member Details

Name

Title	Forename(s)	Surname
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Address

Postcode

Home Tel No

Work Tel No

Email Address

Mobile No

Marital Status

Nationality

Date of Birth

Spouses Date of Birth

N.I. Number

Member's Sex

 Male Female

I do not have a National Insurance Number

Tax Reference

Tax Reference District

Expected Retirement Age

Country of Residence

3 Employment Details

If you are a family member but not employed by the principal employer you must seek their permission prior to joining the scheme. Confirmation of this permission must be provided to Yorssas Limited in writing.

Name of Employer

Date you joined Employer

Are you a Director?

Yes

No

Date you became a Director

% Company Ownership

 %

4 Transfers

Are you transferring benefits under one or more registered pension scheme(s) into your SSAS? Yes No

If yes, please provide the following information and complete a separate SSAS Transfer In Application for each transfer.

Number

Total estimated value

Cash Transfer

In-Specie Transfer

5 Benefits

Are you currently in receipt of benefits? Yes No

Have you drawn flexible benefits from any UK Registered Pension Scheme? Yes No
(i.e. Flexi Access Drawdown or Uncrystallised Funds Pension Lump Sum)

Do you intend to commence benefits immediately? Yes No

If yes, please complete a SSAS Benefit Payment Form.

6 Expression of Wish

On your death, your remaining funds will be applied in accordance with the rules of the Scheme to provide lump sum and/or pension death benefits. Within the overall limits of the tax legislation, the rules give wide discretion over the exact form of benefits, and the recipients.

Do you want the Scheme Trustees to consider paying benefits to a particular individual(s), a trust, or a charity? Yes No

If yes, please complete a SSAS Member Expression of Wish Form, which is available on request or from our website:
<http://www.yorsipp.com/literature/>

7 Protection against the Lifetime Allowance Charge

Have you registered with HM Revenue & Customs for protection against the Lifetime Allowance Charge? Yes No

If yes, please tick all that apply and provide a copy of the certificate or enter the HMRC reference number, as appropriate.

Enhanced Protection	
Enhanced Protection with Lump Sum Protection	
Primary Protection	
Primary Protection with Lump Sum Protection	
Fixed Protection (2012)	
Fixed Protection 2014	
Individual Protection 2014	
Fixed Protection 2016	
Individual Protection 2016	

Certificate Enclosed	
Certificate Enclosed	
Certificate Enclosed	
Certificate Enclosed	
Certificate Enclosed	
Certificate Enclosed	
Certificate Enclosed	
Certificate Enclosed	
HMRC Reference	
HMRC Reference	

8 Member Declaration

I hereby apply to become a member of the Scheme referred to above and I agree to be bound by the Trust Deed and Rules, as amended from time to time.

The information provided on this form is correct and complete, to the best of my knowledge.

I wish to nominate the persons named in the Expression of Wish Form to receive any death benefits payable under the scheme on my death.

I consent to Yorssas (Trustees) Limited or Yorssas Limited obtaining information they may require from my employer, any pension provider with which I have benefits and any other person who may hold information required to administer the scheme.

Trustee Terms

I agree to my appointment as trustee and understand that:

- a) the main purpose of the Scheme must be the provision of retirement and death benefits
- b) a trustee has general duties under law and specific duties imposed by the Trust Deed and Rules. A trustee must be aware of the liabilities of the trust and any limitations imposed by HMRC
- c) the trustees have a duty to invest trust assets in the best interests of the beneficiaries and to act as a prudent person would when investing on their own behalf
- d) under trust law all trustees of a trust are jointly responsible for the administration and management of the trust assets whether or not any duties have been delegated to a third party

Investments

All trustees must be party to all investments and the specific consent of Yorssas (Trustees) Limited must be obtained before making any investment.

Mandates for any bank or building society must be signed by all trustees, including Yorssas (Trustees) Limited. A limited liability clause may be required for Yorssas (Trustees) Limited. A copy of all statements must be provided to Yorssas (Trustees) Limited as soon as possible.

Data Protection

The information you have supplied will be used in accordance with our Privacy Policy, which can be found on our website at <http://www.yorsipp.com/general/privacy-policy>.

Name

Position

Signature

Date



PENSION ADMINISTRATORS

Eadie House, 74 Kirkintilloch Road, Bishopbriggs, Glasgow G64 2AH

Tel 0141 772 3365 Fax 0141 762 1862

All calls are recorded for quality, monitoring, training and fact verification purposes.

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