



GATEWAY TRUSTEES

New SSAS Establishment Form

Section 1 – The Employer

1. Details of the Principal (or only) Employer

Registered Name:

Registered Address:

Office Tel:

Email:

3. Financial Details

Financial year end:

Nature of business:

Is Employer a UK Trading company for tax purposes?

PAYE reference:

Account office reference (PAYE)

2. Corporate Details

Status e.g. Ltd Co, Partnership:

Company Unique Tax Reference (UTR):

Is the employer associated with other companies. If so, give details:

Corporate Details continued...

Companies House No:

Who owns shares?

Section 2 – The Scheme

1. Scheme details

Proposed name of scheme:

Name and address of scheme accountants:

2. Trustee details

Full name and address of each trustee:

4. Contribution details

Initial contribution when scheme is established:

Estimate of regular contribution per annum:

3. Cheque signing etc. (in addition to professional trustee)

Which of the member trustee are to sign cheques:

Section 3 – The Members

1. Personal details

Full name and title:

Home address:

Home Tel No:

Mobile No:

Email address:

DOB:

NI No:

Is the member a director or employer? (or has been in last 10 years (if so, when did directorship cease?))

Personal details continued...

Is the member on the payroll of the employer?

UK resident for more than 5 years?

Marital Status:

3. Spouse and dependants

Full name and date of birth:

2. Remuneration

Date member commenced drawing salary from Employer:

If member was a company director prior to drawing of remuneration, please indicate the date at which directorship commenced: