

Installation Questionnaire - Additional Information

Additional information required to register Scheme with HMRC.

HM Revenue & Customs (HMRC) require the additional information requested below to enable the Scheme to be registered. Please note these are the current requirements for HMRC registration and are subject to change.

The information captured on this form will be used by Rowanmoor to pass on to HMRC for the purposes of registering the Scheme. Personal information for directors of the employer, who are not members of the Scheme will be destroyed once registration has been confirmed and it will not be used for any other purpose. Other information supplied will be held in the strictest confidence and subject to the provisions of Data Protection Legislation. Please refer to the Group Privacy Notice for more information.

Additional Information

Employer details

Please confirm the number of employees currently employed by the principal employer and any proposed additional participating employer.

Principal Employer

Participating
Employer

Is the principal employer or any proposed additional participating employer registered for VAT?

YES NO

Principal Employer

Participating
Employer

If yes, please provide the VAT reference for the principal and any proposed additional participating employer.

Address

If the principal employer or any proposed additional participating employer has been at the address detailed on the Installation Questionnaire for less than 12 months, please provide the previous address:

Postcode

Has the principal employer or any proposed additional participating employer been dormant for any period during the last 12 months?

YES NO

If yes, please provide details.

Company directors

Please complete the following information for all directors of the principal and any proposed additional participating employer. Please photocopy these pages and complete for additional directors as required.

Name

Address

Postcode

If resident at the above address for less than 12 months, please provide the previous address:

Address

Date of birth

Postcode

National insurance number

Unique taxpayer reference number

If the Director does not have a Unique Taxpayer Reference number please confirm the reason:

Telephone Number

Email Address

Company directors (continued)

Please complete the following information for all directors of the principal and any proposed additional participating employer.

Name

Address

Postcode

If resident at the above address for less than 12 months, please provide the previous address:

Address

Date of birth

Postcode

National insurance number

Unique taxpayer reference number

If the Director does not have a Unique Taxpayer Reference number please confirm the reason:

Telephone Number

Email Address

Company directors (continued)

Please complete the following information for all directors of the principal and any proposed additional participating employer.

If resident at the above address for less than 12 months, please provide the previous address:

Name

Address

Postcode

Address

Date of birth

Postcode

National insurance number

Unique taxpayer reference number

If the Director does not have a Unique Taxpayer Reference number please confirm the reason:

Telephone Number

Email Address

Company directors (continued)

Please complete the following information for all directors of the principal and any proposed additional participating employer.

If resident at the above address for less than 12 months, please provide the previous address:

Name

Address

Postcode

Address

Date of birth

Postcode

National insurance number

Unique taxpayer reference number

If the Director does not have a Unique Taxpayer Reference number please confirm the reason:

Telephone Number

Email Address

Scheme members

If any member has resided at the address detailed on the member questionnaire for less than 12 months, please provide the previous address. Please photocopy this page and complete for additional members as required.

Member name

Previous address

Postcode

Member name

Previous address

Postcode

Member name

Previous address

Postcode

Member name

Previous address

Postcode

Member name

Previous address

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Member name

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Member name

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Postcode

rowanmoor.co.uk

Rowanmoor is a trading name of the following three companies, Rowanmoor Executive Pensions Limited registered number 05792242, Rowanmoor Personal Pensions Limited registered number 02268900 and Rowanmoor Trustees Limited registered number 01846413. The registered office for each of these three companies is Rowanmoor House, 46-50 Castle Street, Salisbury, SP1 3TS. The three companies are also wholly owned subsidiaries of Embark Group Limited. Rowanmoor Personal Pensions Limited is authorised and regulated by the Financial Conduct Authority (FCA) under reference number 458260. The provision and administration of Small Self-Administered Schemes (SSAS) and trustee administration are not regulated by the FCA. Therefore, Rowanmoor Executive Pensions Limited and Rowanmoor Trustees Limited are not regulated by the FCA in relation to these schemes or services.

If you require this document in audio, large print or Braille format, please telephone 03445 440 550 or fax 03445 440 500.