



**SSAS Practitioner.com**  
**The SSAS Specialist**  
Lowering Fees, Enhancing Retirement

## SMALL SELF ADMINISTERED SCHEME (SSAS)

### FEE AGREEMENT

<b>SCHEME NAME:</b>	
Date of issue:	

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 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 of the scheme.

<b>SSAS Practitioner.com Limited</b>	
Signed:	
Date:	
<b>The client</b>	
Signed:	
Date:	



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## **SMALL SELF ADMINISTERED SCHEME (SSAS)**

### **FEE AGREEMENT**

The annual fee of £995 + VAT per annum (pa) requires SSAS Practitioner.com Limited 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 transfer of existing policies to the SSAS (no transfer advice given);
- All ongoing liaison with HMRC, event reporting and submission of the annual pension scheme return;
- Liaising with banks to arrange scheme borrowing;
- Set up and payment of tax-free cash and pension from the 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 included in our annual fee);
- Provision of annual valuations at the scheme year end, or more frequently if required; and
- Inclusion of up to four members in the scheme.

The only additional charges are for:

- Provision of PAYE if you do not arrange your pension payments through your company payroll (£200 + VAT pa);
- Additional members above four (£150 + VAT pa per extra member);
- Setting up and administering a Relief at Source Scheme in order to facilitate personal contributions (£500 + VAT pa); and
- Setting up and administering VAT registration for the scheme (£300 + VAT pa).

### **PAYMENT OF FEES**

SSAS Practitioner.com Limited 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.

Please note that all new set-ups and take-overs are subject to 7-day credit terms.

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