

SSAS Service

Experience counts

This is a competitive and flexible service, offering you and your clients a broad investment choice. Administered by James Hay Partnership, with over 30 years experience in pensions administration.

15

Reasons to use the James Hay Partnership SSAS Service

Choice makes the difference

1. The James Hay Partnership SSAS Service will allow you to invest in all types of assets allowed by HMRC*.

Fees and Charges explained

2. Our SSAS service offers a transparent fee structure that is simple and easy to understand.
3. There are no in-house charges for transactions made by the SSAS.
4. Simple, transparent charges. For unusually high volumes of transactions – requiring a level of work not covered by the standard annual fee – additional fees will be agreed with clients in advance, avoiding unexpectedly high bills at the end of the year.

* subject to our own fund vetting and suitability checks.

Secure and expert administration

5. One point of contact: a dedicated support team responsible for day-to-day SSAS administration so advisers and clients alike benefit not only from having continuity of service but also from high standards of support and guidance.
6. We take a pragmatic approach to problem solving, utilising the experience gained over more than 30 years in the self-administered pension scheme industry.
7. This SSAS is administered using fully integrated online systems which include downloadable applications and allows access to a wide range of guidelines covering most technical issues.

Property

8. There are no restrictions for the use of a specific solicitor or property manager for SSAS property purchases. So, the choice rests with the client.
9. No fees are charged for the use of your preferred solicitor or property manager for SSAS property purchases.
10. To keep fees to a minimum, the responsibility for collection of rents, rent reviews, lease expiries and VAT returns lies with the client.

Other Investments

11. Any appropriately regulated fund manager or financial adviser is permitted to handle the investment of accumulated funds.
12. The purchase of warrants, futures, options, hedge funds, contracts for difference, unquoted shares and gold bullion is permitted.
13. Member Trustees have the freedom to choose a bank account of their choice.

Transfers, Contributions and Benefits

14. In-specie transfers of assets, payment of in-specie contributions and retirement benefits are permitted, which means situations are avoided where investments would otherwise have to be cashed-in prematurely, thereby incurring early surrender penalties or Market Value Reductions.
15. A wide range of options for payment of benefits on retirement and death are available, including tax free lump sums, Capped Drawdown and Flexible Drawdown.

For a James Hay SSAS pack,
please contact us on:



Bristol 08455 212 414
Manchester 08458 735 722



www.jameshay.co.uk

James Hay Partnership is able to provide literature in alternative formats. The formats available are: Large Print (as recommended by RNIB), Braille, Audio Tape and PC Disk. If you would like to receive this document in an alternative format please contact us on 0845 850 4455. For the hard of hearing and / or speech impaired, please use the Typetalk service via 18001 0845 850 4455.

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