



# HERITAGE PENSIONS

## BORROWING INFORMATION

SSAS scheme name \_\_\_\_\_

**PLEASE RETURN THIS FORM TO:**

Heritage Pension Administration Limited  
6 Doolittle Mill  
Froghall Road  
Amphill  
Bedfordshire  
MK45 2ND

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# 1 Member Details

Title Mr  Mrs  Miss  Ms  Other

Name

Permanent residential address   
  
 Postcode

Telephone numbers Home  Work   
 Mobile  Fax

If there is more than one SSAS Member/Trustee borrowing, please provide details on a separate sheet

# 2 Lender Details

Name of firm

Address   
  
 Postcode

Contact name

Email address

Telephone numbers Office  Mobile

Is the lender connected to you? Yes  No

If 'Yes', please explain how connected



## 3 Documentation

Please confirm which documents have already been prepared and provide copies when returning this form

Facility/offer letter

Legal charge

Other (please specify)

## 4 Reason for Borrowing

To assist property purchase

Other (please specify)

## 5 Borrowing Repayment Terms

Amount to be borrowed



**Please confirm terms of borrowing**

Regular contribution      Monthly       Quarterly   
    Annually       Other

Repayment amount      £       Term   
 Interest rate       %      or Base rate plus  %

Are all arrangement fees included in the amount to be borrowed?      Yes       No

How will the repayments be funded?

# 6 Member's Declaration

**As a Member of the Heritage SSAS I confirm that:**

- I have taken advice on the suitability of the borrowing
- The above information is to the best of my knowledge, true and complete and no material details have been omitted
- I authorise the use of this information to be disclosed to relevant parties
- I authorise Heritage Pensions Limited to give and request information necessary to complete this transaction and comply with HMRC requirements

Signature

Name

Dated

