Loanback Request Form & Trustee Declaration

Scheme Details

Scheme Name:

Scheme Reference Number:

Section 1 Current Scheme Investments

Asset	Surrender Value (£)	Date
TOTAL Net Asset Value	£	
50% of Fund	£	
Less the value any loans still in outstanding	£	
Maximum amount of loan available	£	

If you wish to proceed with this loan, please complete Section 2 below and sign the trustee declaration.

Section 2 Borrower and Loan Details

Employer's name:	
Employer's Companies House number:	
Employer's registered address is:	
Employer's business address: (if different from the registered address)	
Term of Loan (in whole years). The maximum term is 5 years:	
Rate of Interest (this must be at least the prescribed rate of [insert rate] set by HMRC):	
Solicitor details: (who will deal with the legal charge)	
Details of the security over which the loan is to be secured:	

I/we enclose a letter from the borrower on their company headed paper setting out the purpose for the loan. (Please note that we will be unable to proceed with the loan without this)   Yes   No

The loan will be funded by money in the trustees' bank account   Yes   No

The loan will be funded by encashing the following assets:

1.

2.

3.

4.

I/we enclose a letter from the borrower's accountant

(If no, we, being the member trustees indemnify GPC Premier SSAS Limited and the Professional Trustee should the loan default or the borrower be unable to repay the loan upon demand)   Yes   No

We, the Member Trustees of the

declare that the above information is true to the best of our knowledge and we have read and understood the content of the covering loan letter. We further confirm that the scheme assets detailed in Section 1 are correct.

Name:

Signed:

Name:

Signed:

Section 2 Borrower and Loan Details

Name: [   ]

Signed: [   ]

GPC
Premier SSAS

For more information please contact

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