RedwoodBank

Secured Pension and Trust Loan
Supplementary information sheet

1 Primary contact details

Name of scheme/trust

Type of scheme/trust Scheme

HMRC registration no.

Are you the:

- [ ] IFA
- [ ] Pension/Member trustee
- [ ] Scheme administrator
- [ ] Corporate trustee

2 Correspondence address

Name of scheme administrator

Address

Postcode

Date appointed

Telephone number

Email address

Name of corporate trustee
(if applicable)

Address

Postcode

Date appointed

Telephone number

Email address

Please ensure you provide a list of authorised signatories alongside this form.

3 Secured pension

Administrators valuation £

Loan to asset value %

Existing borrowers within scheme £

Scheme valuation attached
- [ ] Yes

Pension Scheme Tax Reference (PSTR)

Please provide limitation of trustee liability wording here
(This is mandatory if you have selected the type of trust scheme to be a SIPP)

4 Trust loan

Trust valuation breakdown

SIPP/SSAS Valuation		Date	
Cash	£	Property	£
Listed shares	£	Unlisted Shares	£
Other	£	Total	£

5 Trustee details

Full name		Full name	
Date of birth		Date of birth	
Address		Address	
Full name		Full name	
Date of birth		Date of birth	
Address		Address	

6 Beneficiary details

Full name		Full name	
Date of birth		Date of birth	
Address		Address	
Full name		Full name	
Date of birth		Date of birth	
Address		Address	

Secured Pension and Trust Loan
Supplementary information sheet checksheet

Once you have fully completed this Information sheet please ensure you have the following ready to submit with this form.

Redwood Bank will require all loan repayments to be made via Direct Debit and will not accept manual or standing order payments.

Documents required for Self Invested Personal Pension (SIPP)

- [ ] New Lending Application Form signed by all Trustees
- [ ] Copy of Trust Deed
- [ ] Copy of Pension Scheme Valuation
- [ ] Limited Liability wording has been detailed in Section 3 of this Secured Pension and Trust Loan Supplemental Information Sheet
- [ ] Signed letter of authority or Customer Application Form signed by the Scheme Administrator/ Corporate Trustee
- [ ] Evidence that the individuals signing the application/facility letters have full authority to do so (trust deed/deed of appointment/resolutions/power of attorney)

Documents required for Trusts and Small Self Administered Scheme (SSAS)

- [ ] New Lending Application Form signed by all Trustees
- [ ] A Copy of the Trust Deed
- [ ] A copy of the Pension Scheme Valuation
- [ ] Three months' recent bank statements for each Trustee
- [ ] Statement of Assets, Liabilities, Income and Expenditure for all Trustees
- [ ] A property schedule covering all of the Trustees' properties
- [ ] 2 years' tax returns for all Trustees

When you have gathered all information, please send this form, along with the New Lending Application Form and supporting information to your Business Development Manager at Redwood Bank who will oversee this application for you.

We cannot progress the application until all detailed documentation is received. Once all information is received we will conduct our review. As part of our review we may need to request additional information. If this is required we will contact you accordingly.

The information supplied in this form will be used to assess the loan application and will be verified accordingly. Full details of how the information will be processed, applicable rights, and how to contact the Data Protection Officer can be found in the Authority and Declaration section of the New Lending Application Form.