

# Secured Pension & Trust Loan Supplementary Information Sheet

**Please complete this form in BLOCK CAPITALS and black ink, and return it to:**

Cambridge & Counties Bank Limited,  
Charnwood Court, 5B New Walk, Leicester LE1 6TE

If you need any help to complete this form please telephone 0344 225 3939

## Primary Contact Details

Name of Scheme / Trust

Type of Scheme / Trust  
(i.e. SIPP, SSAS, etc)

Scheme HMRC  
Registration Number

Are you the  IFA  Pension/Member Trustee  Scheme Administrator  Corporate Trustee

## Scheme Administrator & Corporate Trustee Details

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

## Secured Pension

### Pension Scheme Valuation

Administrators Valuation  Date of Valuation

Loan to Asset Value  % Existing borrowers within the scheme

Valuation Attached Yes  No

## Trust Loan

### Trust Valuation

Assets  Cash  Loan to Asset Value  %

### Trustee Details

Full name <input type="text"/>	Full name <input type="text"/>
Date of Birth <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/>	Date of Birth <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/>
Address <input type="text"/> <input type="text"/>	Address <input type="text"/> <input type="text"/>

Full name <input type="text"/>	Full name <input type="text"/>
Date of Birth <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/>	Date of Birth <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/>
Address <input type="text"/> <input type="text"/>	Address <input type="text"/> <input type="text"/>

### Beneficiary Details

Full name <input type="text"/>	Full name <input type="text"/>
Date of Birth <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/>	Date of Birth <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/> <input type="text" value=""/>
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**Cambridge & Counties Bank Limited**  
Charnwood Court  
5B New Walk  
Leicester LE1 6TE

**Tel:** 0344 225 3939  
**Fax:** 0116 254 4637  
**Email:** borrow@ccbank.co.uk  
**Web:** ccbank.co.uk

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