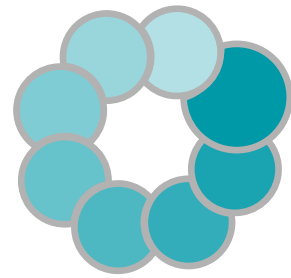


Sestini & Co



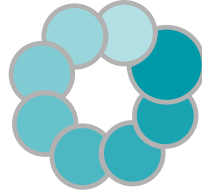
Pension Trustees Ltd

Bespoke Management and Trustee Services for SSAS Pension Schemes



Sestini & Co

Pension Trustees Ltd



What we do

Sestini & Co Pension Trustees Ltd runs alongside our sister company, Sestini & Co Tax and Business Consultancy. Our combined pension and taxation expertise makes us ideally placed to support the bespoke pension needs of business owners by bringing our experience and foresight to bear to provide a flexible SSAS (Small Self-Administered Scheme) pension for your business.

Whilst the role of Professional Trustee does not include the provision of financial advice or wealth management, our experienced team will work alongside a wealth manager of your choosing to provide a seamless service tailored to your needs.

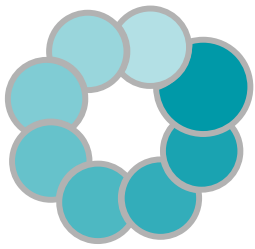
Our role is primarily to ensure that whichever way the business owners decide to invest their pension funds, the pension scheme continues to operate in such a way as to optimise the benefit of the pension for your business, whilst operating within the guidelines established by HMRC.

What is a SSAS?

A SSAS (Small Self-Administered Scheme) is a pension vehicle established under Trust by a private limited company and registered with HMRC.

The Trust SSAS provides a means of pension saving that runs alongside your limited company, and allows for investment decisions to be made by the business owners who are also the scheme Trustees and Members.

Sestini & Co Pension Trustees Ltd provides support by assisting with the management and administration of the scheme, completing annual filing with HMRC and The Pensions Regulator (where appropriate) and allowing for seamless transactions, all the while ensuring that the activity of the SSAS operates within HMRC parameters.



How we work

We established Sestini & Co Pension Trustees Ltd to provide bespoke pension administration services to support business owners who wish to take control of their retirement savings and align them with the needs of the business.

In our role as Professional Trustee, we look to ensure that our clients are empowered to maximise the benefit of their pension portfolio for themselves and their business, safe in the knowledge that they have experts on hand to provide assistance every step of the way.



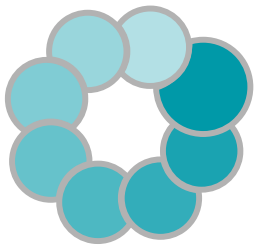
Who we are

We're a team of pension and taxation experts, with experience in organisations such as the Big Four, private banks, and specialist Self-Invested Pension (SIPP and SSAS) providers.

Bespoke management of Trust-based SSAS pension schemes is our speciality, and along with our network of other professionals in areas such as will and estate management, financial and corporate planning, we can help ensure a holistic solution for your retirement needs.



*Rachel Sestini, Managing Director,
Supported by a team of highly
qualified professionals*



Testimonial

Rachel and her team have provided an invaluable service to me and my clients in advising on a wide range of tax planning areas. Their efficient and honest approach has ensured that clients clearly understand their position and have the clarity needed to successfully implement the advice they receive.

*Ed McKenzie, McKenzie Wealth Management Ltd,
a Partner Practice of St James's Place Wealth Management.*



If you'd like to become a client

We start every new client interaction with a meeting or call to talk about your needs.

We ensure our understanding by providing you with a proposal/scoping document which reiterates our understanding of your current position and what's been discussed.

Pension Trustee Services is a complex area. Our focus is on understanding the appropriate solutions for you and making sure we're doing everything we should be to ensure that you maximise the benefits to you of our Trustee Services.

We conduct regular reviews with you as your circumstances change or as legislation changes and to ensure our advice stays current.

Our aim is to provide sensible planning and advice that fits your risk profile.



Sestini & Co

Pension Trustees Ltd



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