

Doherty

Pension Administration

WHY CHOOSE A DPA PRACTITIONER SSAS?

Doherty Pension and Investment Consultancy have had a long history with Small Self Administered Schemes (SSAS's). We have been key participants in designing, installing and running pension schemes for over 30 years in Northern Ireland.

To meet the everchanging challenges of business and retirement planning today, we have created a cost effective proposition that centres around the member, their business and their financial plans.

In 2020 Doherty Pension and Investment Consultancy invested and established their own SSAS Trust Deed with a full account management service under the name of *Doherty Pension Administration (DPA)*. **This enables us to set up new SSAS schemes and take over existing ones, providing all your financial advice requirements and implementation of that advice under the same roof, delivering a flexible, streamlined process without third parties being involved with the running of your SSAS scheme.**

Doherty Pension Administration will support and manage all regulatory and administrative aspects of running your own scheme (including the various HMRC reporting requirements) within a simple and transparent fee structure.

The service *Doherty Pension Administration* will provide to you can be specifically tailored to meet your individual needs, which ensures you are only paying for the services you require. Our basic annual fees includes all regulatory requirements and an annual update to the members;

- Professional Practitioner Services through Doherty Pension Administration
- Ensure scheme is compliant with current regulations and legislation
- Annual Scheme Valuation
- Annual calculation of members fund share
- Reconciliation of bank transactions
- Adding new members to the scheme
- Submission of HMRC Annual Pension Scheme Return
- Submission of HMRC Annual Reportable Events (where applicable)
- Routine administration - including Data Protection renewal, Pensions Regulator renewal, record keeping and ongoing general correspondence.

Additional services are available, depending on your scheme set up, including property management, invoicing services, VAT Reporting, Loanback Arrangements and Income Drawdown.

Refer to the contact details below for further information on our SSAS services.

