



gavin mccloskey <gavinm@retirement.capital>

FW: Trustee of the Alexander Chapel Associates Limited Small Self Administered Scheme Pension Fund (ACAL SSAS Ref MK:MA:ALE00011/0001)

2 messages

Stuart Travis <Stuart@alexanderchapel.co.uk>
To: gavin mccloskey <gavinm@retirement.capital>
Cc: Emily McAlister <emily@retirement.capital>

Mon, Dec 20, 2021 at 3:38 PM

Hi Gavin

The Solicitors Meade King acted for the trustees for conveyancing of property (6 Berkeley Square) in the SSAS, I wrote to Simon East who has been holding the money for us but he is away until 4th Jan 2022, I contacted his secretary as requested on the out of office, and Laurena was able to supply the confirmation of the sale date and amount, along with theirs and the agents invoices, I also requested confirmation of the amount paid under court order for Monica Doherty, I believe the amount paid to her includes charges to the fund for late payment hence the discrepancy between amount on my spreadsheet and the amount on this e-mail.

Let me know if you require anything further, from Meade King, Mark Doherty or me.

Many thanks

Stuart Travis
Director

Alexander Chapel Recruitment Ltd

ALEXANDERCHAPEL

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Head office: +44 (0) 1179 859985

E-mail: stuart@alexanderchapel.co.uk

Alexander Chapel Website: www.alexanderchapel.co.uk

From: Laurena Bateman [<mailto:llb@meadeking.co.uk>]
Sent: 20 December 2021 15:02
To: Stuart Travis <Stuart@alexanderchapel.co.uk>

Cc: Simon R. East <sre@meadeking.co.uk>

Subject: RE: Trustee of the Alexander Chapel Associates Limited Small Self Administered Scheme Pension Fund (ACAL SSAS Ref MK:MA:ALE00011/0001)

Dear Stuart,

I have had a look into this for you.

I can confirm that the sale price was £700,000 and the date of completion was 18 October 2013.

I also attach the estate agent invoice paid from 24 October 2013.

From the system the amount transferred seems to be £155913.94 to Monica Doherty.

I also attach our invoice which I believe was deducted from the sale proceeds.

I hope this helps. Simon will not be back until the new year now and this seems to be the only information I can find available, however if you need any further assistance I will pass this onto one of the solicitors here in the hope that they can help.

Kind regards,

Laurena

Laurena Bateman

Secretary

Tel 0117 9264121

Email: llb@meadeking.co.uk

From: Stuart Travis [mailto:Stuart@alexanderchapel.co.uk]

Sent: 20 December 2021 10:36

To: Laurena Bateman

Subject: FW: Trustee of the Alexander Chapel Associates Limited Small Self Administered Scheme Pension Fund (ACAL SSAS Ref MK:MA:ALE00011/0001)

From: Stuart Travis

Sent: 20 December 2021 10:27

To: 'Simon R. East' <sre@meadeking.co.uk>

Subject: RE: Trustee of the Alexander Chapel Associates Limited Small Self Administered Scheme Pension Fund (ACAL SSAS Ref MK:MA:ALE00011/0001)

Hi Simon

We are nearly there reference SSAS pension, HSBC have agreed that I can use our old Alexander Chapel Associates SSAS account to facilitate final transfer of the funds so I will send you a document soon with everyone's signature to make the transfer.

In the meantime I am being asked by the company winding up the pension for confirmation of details of the property sale, they need date it was sold, I am thinking July 2013? the price paid and confirmation of any costs for estate agents or solicitors fees that were deducted, also confirmation of the amount for transfer to Monica Doherty and when that was made.

I have the original sales price of £700000 and approximately £141000 paid out to Monica Doherty?

I look forward to hearing from you

Many thanks

Stuart Travis
Director

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From: Simon R. East [<mailto:sre@meadeking.co.uk>]

Sent: 06 May 2021 18:28

To: Stuart Travis <Stuart@alexanderchapel.co.uk>

Subject: RE: Trustee of the Alexander Chapel Associates Limited Small Self Administered Scheme Pension Fund (ACAL SSAS Ref MK:MA:ALE00011/0001)

Hi Stuart

Thanks for your email. We are currently holding £538,504.25 and we didn't ever make any payment to Barnett Waddingham.

I will wait for further instructions in this regard.

Kind regards

Simon East

Partner

DDI: 0117 9234013

Tel: 0117 9264121

Email: sre@meadeking.co.uk



From: Stuart Travis [<mailto:Stuart@alexanderchapel.co.uk>]

Sent: 06 May 2021 16:37

To: Simon R. East

Subject: FW: Trustee of the Alexander Chapel Associates Limited Small Self Administered Scheme Pension Fund (ACAL SSAS Ref MK:MA:ALE00011/0001)

Hi Simon

I have tried to call a couple of times this week, just wanted to update you reference the funds being held for Trustee of Alexander Chapel Associates SSAS, we are nearing agreement and have found someone happy to help wind up the pension. They have agreed to set up an account for us to put the money in, I am getting the agreement document drawn up and need a figure of total being held, based on our last e-mail below I am assuming you now hold £533195.91 as we had £5k transferred to Barnett Waddingtons.

Can you please confirm if this is correct and then I can go ahead and get the correct documents drawn up and signed ready for transfer.

Many thanks

Stuart Travis
Director

Alexander Chapel Recruitment Ltd

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E-mail: stuart@alexanderchapel.co.uk

Alexander Chapel Website: www.alexanderchapel.co.uk

From: Simon R. East [<mailto:sre@meadeking.co.uk>]

Sent: 12 September 2019 11:02

To: Stuart Travis <Stuart@alexanderchapel.co.uk>

Subject: RE: Trustee of the Alexander Chapel Associates Limited Small Self Administered Scheme Pension Fund (ACAL SSAS Ref MK:MA:ALE00011/0001)

Hi Stuart

Thanks for your call and as discussed I think it is time for us to send the remaining monies to an account in the joint names of the trustees. Under the Solicitors' Accounts Rules we cannot use our client account as a bank account for clients, making payments here and there as the need arises. Our original retainer envisaged that we would hold the monies following completion of the sale and then distribute them in one go.

We made a payment last year pursuant to a court order but I understand that the present request will be for a relatively small amount (£2500) to cover professional costs for Barnett Waddingham, and there are likely to be further similar payments required in the future.

You indicated on the telephone that you can resurrect the trustees' bank account (although this will take eight weeks) and I would suggest therefore that once open I should transfer all remaining monies there; subsequent payments for professional fees etc can be made out of that account. On reflection I don't think that we can even make one small payment to Barnett Waddingham in the meantime since their advice to the trustees does not relate to the underlying transaction for which we were originally instructed (ie the sale of 6 Berkeley Square) – the SRA has clear guidance on this.

In order to make any payment from our account I will need the instructions of all four of the trustees – a letter on similar lines to that from last time will suffice. Please note that the amount we currently hold is £538,195.91.

Let me know if you have any questions.

Kind regards

Simon East

Partner

DDI: 0117 9234013

Tel: 0117 9264121

Email: sre@meadeking.co.uk



From: Stuart Travis [<mailto:Stuart@alexanderchapel.co.uk>]

Sent: 11 September 2019 16:44

To: Simon R. East

Subject: Trustee of the Alexander Chapel Associates Limited Small Self Administered Scheme Pension Fund (ACAL SSAS Ref MK:MA:ALE00011/0001

Hi Simon

I am one of the Trustees of the Alexander Chapel Associates Limited Small Self Administered Scheme Pension which I understand you company holds the fund.

The trustees have asked me to make a payment from our HSBC account to our new pension Administrator which is proving difficult as the current account is no longer current due to inactivity.

Could you please contact me so we can discuss options with the funds you are holding for us.

You can call me on my mobile 07768865500 any time or send me a number and a suitable time and I will happily call you.

Kind regards

Stuart Travis

Director

Alexander Chapel Recruitment Ltd

11 Elmdale Road

[Tyndalls Park](#)

Clifton

Bristol, BS8 1SL

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Meade King is proud to support Alive – Lighting Up Later Life as our Charity of the Year. Alive is one of the leading practitioners in the UK of meaningful activity for older people in care. Find out more about their work here:
<https://aliveactivities.org/>

CHRISTMAS CLOSING: Please note the office will close for Christmas on Friday 24 December 2021 at 12.00 noon and will re-open at 8.30am on Tuesday 4 January 2022. Best wishes for a very happy Christmas and a prosperous new year from all at Meade King.

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<https://aliveactivities.org/>

2 attachments



1289302 GVA Invoice.pdf
245K



invoice.pdf
410K

gavin mccloskey <gavinm@retirement.capital>
To: Stuart Travis <Stuart@alexanderchapel.co.uk>
Cc: Emily McAlister <emily@retirement.capital>

Wed, Dec 22, 2021 at 12:40 PM

Thanks Stuart, are you able to email to me the deposit account statements for HSBC.

[Quoted text hidden]

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Web: <https://retirement.capital>
Phone: 0330 311 0088
Email: gavinm@retirement.capital

Data Processing Centre
Retirement.Capital
Venture Wales Building
Merthyr Tydfil Industrial Business Park
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