



Veronica Walkman <veronica@retirement.capital>

Fwd: FW: Calibre Homes (SW) Limited SSAS

Emily McAlister <emily@retirement.capital>
To: Veronica Walkman <veronica@retirement.capital>

18 November 2021 at 11:47

----- Forwarded message -----

From: **phil clayton** <phil.clayton@hotmail.co.uk>
Date: Thu, 18 Nov 2021 at 10:31
Subject: FW: Calibre Homes (SW) Limited SSAS
To: emily@retirement.capital <emily@retirement.capital> <emily@retirement.capital>

Good morning Emily, apologies for the delay in responding.

I'm unsure as to why I didn't pick the email up.

Valuation last year £348,960.

This year valuation £348,960 + £17,448 interest on preference shares = £366,408

There have been no transactions on the fund and it has not acquired or disposed of any assets.

Regards,

Phil

Sent from [Mail](#) for Windows

From: [Paul Greaves](#)
Sent: 17 November 2021 12:10
To: [phil.clayton@hotmail.co.uk](#)
Cc: [Ken Hart](#); [DAS@richardsonswift.co.uk](#)
Subject: RE: Calibre Homes (SW) Limited SSAS

Hi Phil,

Assume you will respond directly to Emily on this – we haven't been involved in the shares/valuations.

Kind regards,

Paul

Paul Greaves FPMI, CFPTM
Chartered Financial Planner

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From: Emily McAlister <emily@retirement.capital>
Sent: 17 November 2021 11:56
To: phil.clayton@hotmail.co.uk; Paul Greaves <paul@hartgreaves.co.uk>
Subject: Re: Calibre Homes (SW) Limited SSAS

Dear Phil,

We are preparing your scheme pension tax return and require some information. Can you help with the following please?

Shares valuation as at 05 April 2021

I look forward to hearing from you.

Thank you

Emily

On Wed, 6 Oct 2021 at 16:51, Emily McAlister <emily@retirement.capital> wrote:

Dear Phil,

We are preparing your scheme pension tax return and require some information. Can you help with the following please?

Shares valuation as at 05 April 2021

I look forward to hearing from you.

Thank you

Emily

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Web. <https://retirement.capital>

Phone: 0330 311 0088

Email: emily@retirement.capital

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18/11/2021, 12:58

Retirement.Capital Mail - Fwd: FW: Calibre Homes (SW) Limited SSAS

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