



Georgina Martin <georginam@retirement.capital>

Clayton Ponting Executive Pension Scheme

Robert Lawrence <robert.Lawrence@rowanmoor.co.uk>
To: Georgina Martin <georginam@retirement.capital>

Tue, Dec 1, 2020 at 3:41 PM

Good Afternoon Georgina

Mr Ponting has partially crystallised his pension, with 88.6% of the scheme being crystallised and the remainder being uncrystallised.

Mr Ponting did indicate that he wanted to convert to Flexi-access drawdown however we never received the forms back for us to convert. As Mr Ponting was planning to convert to Flexi-access drawdown we only did an informal review and his current maximum available income is £69,374.04.

Mr Ponting originally crystallised £198,660.00 on the 29 September 2009, taking £49,665.00 as PCLS. This consumed 11.35% of the LTA. A further £200,000 was crystallised on the 1 December 2010 with a PCLS of £50,000 being paid. This consumed 11.1% of the LTA. When the LTA was tested against the Lifetime allowance for Mr Pontings 75th birthday a further 23.25% of the LTA was consumed.

Pauline Ponting had a minimal share of the scheme and was allocated as fees when she passed away.

I have asked our Property team if they have a copy of the valuation as the documentation I have refers to the valuation but doesn't have any documentation evidencing it.

If you need any further information please let me know.

Kind Regards

Rob

[Quoted text hidden]

Robert Lawrence
Administrator | Pension Admin

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