



Stacy Lunnon <stacyl@retirement.capital>

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## Benefit Crystallisation Event

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**David Knight** <david.knight@knightparkerwealth.co.uk>

9 March 2021 at 12:43

To: Stacy Lunnon <stacyl@retirement.capital>

Cc: Geoff Jones <geoff.owenjones@btinternet.com>

Hi Stacy

Hope you are well.

I have chased OMW today in relation to the £8,000 and I must apologise as I mis-read their new website. The money has not yet been sent but on the 2nd March the process began to sell down the units. They have informed me that it should be in the cash fund in the next day or two and will then be sent to the SSAS bank account and they would expect this to be at some point next week.

I have also had a conversation with Geoff and Lisa in relation to next years income. They would like to keep the withdrawal amount at £10,000 per month initially. As neither of them have any income for the next tax year they would like to utilise their personal allowances of £12,570 with the remaining funds being taken from each of their uncrystallised pot. Can you confirm that there are sufficient available tax free funds available for each of them to continue to do this.

Hope that makes sense and if you have any questions please do not hesitate to contact me.

Regards

**David Knight**

**Partner**

**Knight Parker Wealth Management LLP**

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**From:** Stacy Lunnon <stacyl@retirement.capital>

**Sent:** 05 March 2021 09:44

**To:** David Knight

**Cc:** Geoff Jones

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