



Brad Davis <bradd@pensionpractitioner.com>

Folglade SSAS

Abbie Clegg <abbie.clegg@tilney.co.uk>
To: Brad Davis <bradd@pensionpractitioner.com>

23 June 2016 at 11:18

Hi Brad

I tried calling earlier but you were on the phone.

Further to my email last week, please could you provide the below info urgently as the client is keen to make a contribution and I want to make sure they have sufficient carry forward to allow them to do this.

As far as I am aware, there have been the following contributions:

October 2014 £50k, split 78% Jayne, 22% Elaine

March 2015 £50k same split

December 2015 £100k, split 75% Jayne, 25% Elaine?

Could you confirm if correct and also if I have missed any and the pension input periods?

Thanks

Abbie

Abbie Clegg Dip PFS
Paraplanner

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Folglade SSAS

Brad Davis <bradd@pensionpractitioner.com>

23 June 2016 at 13:00

To: Abbie Clegg <abbie.clegg@tilney.co.uk>

Hi Abbie,

I am sorry to miss your call. Please find below the information we hold on our file:-

The input periods coincide with the tax years.

2011-12 tax year - Total contributions of £225,000 (as per the revised pension scheme accounts received from Vikki Wynne), no allocation provided

2012-13 tax year - No contributions recorded in this tax year (as per the revised pension scheme accounts received from Vikki Wynne)

2013-14 tax year - Total contributions of £20,000 (as per the pension scheme accounts), no allocation provided

2014-15 tax year - Total contribution of £100,000 (as per the pension scheme accounts), which matches your figures, no allocation provided

2015-16 tax year - pension scheme accounts have not yet been provided, but I note from Metro Bank statements that 2 payments of £50,000 were made on the 11th of February 2016 with reference FOLGLADE PIPES, which could have been an employer contribution of £100,000 you have down for December 2015. No contribution of £100,000 was made into this account in December 2015 (copy statement attached).

Hope this helps.

If you have any further queries, please let me know.

Kind regards

Brad

[Quoted text hidden]

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**Metro Bank - December 2015.pdf**

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