



Esther S <esther@pensionpractitioner.com>

Re: Instant Pension Trust

1 message

Stacy Lunnon <stacyl@pensionpractitioner.com>
To: Paul Jones <pauldavidjones56@gmail.com>
Cc: Esther S <esther@pensionpractitioner.com>

2 November 2018 at 15:24

Hi Paul,

Thank you, we will proceed with the return on this basis.

Kind regards,
Stacy Lunnon

Pension Practitioner
48 Chorley New Road
Bolton
BL1 4AP

T: 0800 634 4862
F: 020 8906 6611

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On Thu, 1 Nov 2018 at 19:11, Paul Jones <pauldavidjones56@gmail.com> wrote:

Hi Stacy

The payment comes from 1A Instalec and therefore rental income for the Greenwood Court Property. There was a Price hike when I left the company and renegotiated the lease.

Regards,

Paul

On Thu, 1 Nov 2018 at 12:53, Stacy Lunnon <stacyl@pensionpractitioner.com> wrote:

Hi Paul,

Thank you for providing the documents and information for the 2018 tax return. There is a regular payment of £1,500 paid into the Handelsbanken account monthly. Can you clarify whether this payment is contributions or rental income?

Kind regards,
Stacy Lunnon

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On Fri, 3 Aug 2018 at 17:35, Paul Jones <pauldavidjones56@gmail.com> wrote:

Hello Stacy

Please see the attached. Let me know if you require further information.

Paul

On 31 July 2018 at 15:46, Stacy Lunnon <stacyl@pensionpractitioner.com> wrote:

Dear Paul,

We are starting to prepare your Scheme for the annual pension scheme tax return to HMRC which is now due to be submitted.

We would kindly ask that you provide us with the following:

1. Assets values as at 05 April 2018
2. Details of any transactions in or out of the pension scheme during the period that we are not already aware of (period: 06 April 2017 through to 05 April 2018)

If you have prepared pension scheme accounts or a profit and loss and balance sheet for the Scheme then these would be sufficient.

Once we have gathered the required information we will file the pension scheme tax return online through the HMRC pension scheme online services. Whilst doing so, we will undertake a complete review of your Scheme and send to you an Annual Trustees Report.

The Annual Trustees Report for your Scheme will contain a copy of the pension scheme tax return filed at HMRC, a review of your Scheme assets, Member Benefits Statements, any matters that need to be addressed for the continuing tax exemption status of your Scheme and provide you with regulatory updates and any internal company updates.

If you have any questions please do not hesitate to contact either myself or Esther.

Kind regards,
Stacy Lunnon

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