



Esther S <esther@pensionpractitioner.com>

Re: Instant Pension Trust

1 message

Shock Tactics <pauldavidjones56@gmail.com>
To: Esther S <esther@pensionpractitioner.com>

30 August 2019 at 16:01

Please also note that no income from Tennyson Road property as the tenant left the property and I have only recently found a new one.

I have attached a copy of lease for completeness.

Regards,

Paul

On Fri, 30 Aug 2019 at 14:57, Shock Tactics <pauldavidjones56@gmail.com> wrote:

On Fri, 30 Aug 2019 at 14:54, Shock Tactics <pauldavidjones56@gmail.com> wrote:
Hi Ester

Please use the previous property valuations as I do not believe they will have changed.
I have attached Valuation documents from Aegon. Dated 21/05/2019
Included are all Bank Statements and invoice related to properties.

On Mon, 19 Aug 2019 at 14:15, Esther S <esther@pensionpractitioner.com> wrote:
Dear Paul,

Many thanks for your email. I hope you are well.

The assets in your scheme are as follows:

Tennyson Road - £110,000 (last year's valuation)
Greenwood Court - £180,000.00 (last year's valuation)
Cofunds
Handelsbanken

Please may I trouble you to email us the valuations as of 5th April 2019 for:

Property valuations, or confirm that you are happy for us to use last year's valuations
Cofunds valuation
Handelsbanken statements between April 2018 up to 5th April 2019
Details of any transactions to and from the pension scheme account that we are not already aware of

Many thanks for your assistance Paul, and we look forward to hearing from you soon.

Kind Regards

Esther Salmon
Administrator

Please note our new administration and post processing centre:

Pension Practitioner
Office 12
Venture Wales Building
Pentrebach
Merthyr Tydfil
CF48 4DR

T: 0800 634 4862