

Tax Return Data request - Keith and Vanessa Hickman Pension Scheme

Emily McAlister <emilym@pensionpractitioner.com>

Mon 09/12/2019 14:35

To: Keith Hickman <keithhickman@hotmail.co.uk>

Dear Keith,

I hope that you are keeping well.

The renewal and tax returns are due to HMRC for your pension scheme and in order for us to complete the pension scheme return on time we require the following information as soon as possible.

1. Detailed transaction history on the pension scheme bank account ✓
2. Asset values as at 05 April 2019, i.e. investments, property, shares, loans ✓
3. Details of any assets purchased or disposed of during the period ✓

Any other information you feel may be beneficial in the process of us completing your scheme return will be greatly received, also if possible a brief email outlining any movements within the scheme during the period and any other documentation, statements or other attachments that you feel would be relevant in helping us to calculate and complete your pension scheme return as soon as possible.

Thank you.

Kind Regards

Emily McAlister
Administrator

Please note our new administration and post processing centre:

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Pension Practitioner is a tradestyle of The Practitioners Partnership LP

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