



Gavin McCloskey <gavinm@pensionpractitioner.com>

Fwd: Lea Forge Pension Fund

Brad Davis <bradd@pensionpractitioner.com>
To: Gavin McCloskey <gavinm@pensionpractitioner.com>

21 December 2017 at 17:14

----- Forwarded message -----

From: **Brad Davis** <bradd@pensionpractitioner.com>
Date: 20 January 2017 at 22:36
Subject: Lea Forge Pension Fund
To: Stacy Lunnon <stacyl@pensionpractitioner.com>

Hi Stac,

Please see the latest reply below from Roy for discussion on Monday.

Thanks
Brad

Hello Brad

Thanks for the quick reply

Without going back to check, so from memory. We issued loan to Company of £50 (third loan as I recall) in May 2015. Shortly afterwards I received a message from you informing us that the account was to close. As you are aware managing the fund has become a bit of an irritation and given that the account was to close we did not see the point in setting up the standing order as previously. The loan is running as per the attached and is in our accounts as such. (accountant can confirm).

The closing balance of £60314.84 is in our 'other' fund account, clearly could not leave this with Investec. I intended to close the fund last summer however events overtook me until now.

I did try to open an account with HSBC last year however the effort required to open a new account is huge and as mentioned earlier events overtook. In essence the total fund amount is available as and when. What do you suggest.

£825 is not a problem, better to pay from company account to mitigate tax etc etc.

I am away from middle of next week for 10 days.

Regards

Roy

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8/29/2018

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