



Georgina Stuliglowa <georginas@pensionpractitioner.com>

Matlock Ford

Peter Best <pbest@tag.uk.com>

16 October 2019 at 15:53

To: Georgina Stuliglowa <georginas@pensionpractitioner.com>

Hi Georgina,

DT has confirmed as follows:

Would you please confirm if all of the payments of £2,500 received from RF Green are contributions? Is so, are they all split 50/50 between John and Andy?

Yes

There is one payment in particular that may have been named incorrectly as rental income. Please see below.

24/04/2018 DPG 000230554A Rent rcvd - 5 pymts originally 12,500.00

This should be re journaled.

1. There were o/s fees – settled by the sponsoring employer
2. The balancing payment should be recorded as contributions

As far as we know the scheme does not hold any property. Is this an error then?

Yes it was an error

Could you please also confirm the value of Tulip Shares you would like us to use? We have always gone with £144,000, but David said the following to HMRC in his letter:

See attached valuation notice

Yours sincerely

Peter Best BSc (Hons) DipPFS EFA Cert CII (Life and Pensions) MLIBF

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