



Veronica Walkman <veronica@retirement.capital>

Fwd: Maurice Company Directors Retirement Plan

Emily McAlister <emily@retirement.capital>
To: Veronica Walkman <veronica@retirement.capital>

13 January 2022 at 18:21

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

From: **Peter Winter** <Peter.Winter@hjsfinancialplanning.co.uk>
Date: Thu, 13 Jan 2022 at 17:20
Subject: Re: Maurice Company Directors Retirement Plan
To: Emily McAlister <emily@retirement.capital>

Hi Emily,

Please find attached the information you need.

AXA TIP for Laurence as at 05/04/21 - £185,051.70

Quilter (Formerly Old Mutual) for Brenda as at 05/04/21 – £20,432.72

Let me know if you need anything further

Many thanks

Peter Winter FPFS, ER, CeMAP

Chartered Financial Planner



t: 023 8092 0128
m: 07983547584
www.hjssolutions.co.uk



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Registered Office: 12-14 Carlton Place, Southampton, Hampshire SO15 2EA.

From: Emily McAlister <emily@retirement.capital>
Date: Wednesday, 5 January 2022 at 16:14
To: Peter Winter <Peter.Winter@hjsfinancialplanning.co.uk>
Subject: Re: Maurice Company Directors Retirement Plan

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Hi Peter,

We need:

NatWest Bank a/c (statements 06.04.20 - 05.04.21)

Axa TIP at 05.04.21

Friends Life / Old Mutual at 05.04.21

Thank you

Emily

On Wed, 5 Jan 2022 at 17:01, Peter Winter <Peter.Winter@hjsfinancialplanning.co.uk> wrote:

Thanks Emily,

Do you have a copy of the last return? I just forget the assets that you need details of.

Thanks

Peter Winter FPFS, ER, CeMAP

Chartered Financial Planner



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Registered Office: 12-14 Carlton Place, Southampton, Hampshire SO15 2EA.

From: Emily McAlister <emily@retirement.capital>
Date: Wednesday, 5 January 2022 at 15:58
To: Peter Winter <Peter.Winter@hjsfinancialplanning.co.uk>
Subject: Re: Maurice Company Directors Retirement Plan

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Hi Peter,

Happy New Year!

Yes, if you can send the information to me please I will arrange for the scheme return to be prepared and submitted.

Thank you

Emily

On Wed, 5 Jan 2022 at 16:09, Peter Winter <Peter.Winter@hjsfinancialplanning.co.uk> wrote:

Hi Emily,

You emailed me previously in error regarding Maurice Co Pension scheme. Previously Stacy Lunnon at Pension Practioner dealt with the return. Is this something you now deal with?

Thanks

Peter Winter FPFS, ER, CeMAP

Chartered Financial Planner



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Registered Office: 12-14 Carlton Place, Southampton, Hampshire SO15 2EA.

From: Emily McAlister <emily@retirement.capital>
Date: Thursday, 18 November 2021 at 08:37
To: Peter Winter <Peter.Winter@hjssolutions.co.uk>
Subject: Re: Maurice Company Directors Retirement Plan

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Sorry, that was sent to you in error.

Please disregard the request.

Kind regards

Emily

On Wed, 17 Nov 2021 at 17:32, Peter Winter <Peter.Winter@hjssolutions.co.uk> wrote:

Hi Emily,

Who is Lucy Bee?

thanks

Peter Winter FPFS, ER, CeMAP

Chartered Financial Planner



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m: 07983547584

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Registered Office: 12-14 Carlton Place, Southampton, Hampshire SO15 2EA.

From: Emily McAlister <emily@retirement.capital>
Date: Wednesday, 17 November 2021 at 12:10
To: Peter Winter <Peter.Winter@hjssolutions.co.uk>
Subject: Fwd: Maurice Company Directors Retirement Plan

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From: Emily McAlister <emily@retirement.capital>
Date: Thu, 7 Oct 2021 at 11:50
Subject: Maurice Company Directors Retirement Plan
To: <malcolm@sackmans.co.uk>
Cc: <Peter.Winter@hjssolutions.co.uk>

Dear Malcolm and Peter,

We are preparing the Lucy Bee SSAS for the annual pension scheme tax return which is now due to be submitted to HMRC.

To allow us to prepare and submit the return on behalf of the Trustees, can you please provide us with the following data as soon as possible:

Transaction history on the pension scheme bank account from 06 April 2020 to 05 April 2021.

Valuations of all assets held in the pension scheme as at 05 April 2021.

Details of any assets acquired or disposed of during the period 06 April 2020 to 05 April 2021

If you have prepared pension scheme accounts please ignore the above and provide us with a copy of the accounts as this would be sufficient.

I look forward to hearing from you.

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Phone: 0330 311 0088

Email: emily@retirement.capital

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