



Emily McAlister <emily@retirement.capital>

Micron 1996 EPS contributions

3 messages

Simon Carlin <simon@thelostcoin.co.uk>

11 January 2022 at 14:25

To: "Gavin McCloskey (gavinm@retirement.capital)" <gavinm@retirement.capital>

Cc: "Emily McAlister (emily@retirement.capital)" <emily@retirement.capital>

Hi Gavin

Thanks for your voicemail yesterday evening.

Emma Stevens had £2k per month plus £30k oneoff in the year to 31 August 2020 using most of her unused relief. Future conts since April 2021 are £3,333 per month and no further additional conts can ever be paid.

Susan Stevens had £2k per month plus £60k oneoff in the year to 31 August 2020 which fully used her unused relief from previous tax years. No further conts payable since

No conts for Malcolm Stevens at all and none planned in the future.

Trust this answers your queries.

Regards,

Simon Carlin BA DipPFS DipPMI

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gavin mccloskey <gavinm@retirement.capital>

11 January 2022 at 15:11

To: Simon Carlin <simon@thelostcoin.co.uk>

Cc: "Emily McAlister (emily@retirement.capital)" <emily@retirement.capital>

thanks for this Simon - we will treat these as employer conts. Do you wish us to maintain the fund splits on this going forward?

[Quoted text hidden]

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Retirement .Capital



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Simon Carlin <simon@thelostcoin.co.uk>
To: [gavin mccloskey <gavinm@retirement.capital>](mailto:gavinm@retirement.capital)
Cc: "Emily McAlister (emily@retirement.capital)" <emily@retirement.capital>

13 January 2022 at 18:04

Hi Gavin You may as well continue to record contributions. The August 20201 accounts are almost ready and when I send these I will advise the splits for that scheme year. The current scheme year onwards will only ever be for Emma Stevens as the other 2 (her parents) will start pension FAD this quarter. I'm arranging the payroll setup with SOBK whom I use for Oakleaf SIBA too.

Regards,

Simon Carlin

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