



Emily McAlister <emily@retirement.capital>

## Micron Precision (Brixworth) Engineering Limited 1996 Executive Pension Scheme - Tax Return Data Request

3 messages

Emily McAlister <emily@retirement.capital>

1 June 2021 at 12:16

To: emma stevens <emmajayne1982@outlook.com>, sue stevens <sue12\_12@hotmail.com>

Dear Trustees,

Can you please provide me with the following information so we can prepare and submit your scheme tax return:

1. Detailed transaction history on the pension scheme bank account (**we have your AIB statements**)
2. Asset values as at 05 April 2021, 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 and 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.

I look forward to hearing from you.

Thank you.

Kind Regards

Vikki Whitby (on behalf of Emily McAlister)

Retirement  
.Capital



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Emily McAlister <emily@retirement.capital>

1 June 2021 at 12:23

To: emma stevens <emmajayne1982@outlook.com>, sue stevens <sue12\_12@hotmail.com>, Simon Carlin <simon@thelostcoin.co.uk>

Hello All

My apologies, I should have sent the original email to Simon, who I have now copied in.

Kind regards

Vikki Whitby

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**Simon Carlin** <simon@thelostcoin.co.uk>

1 June 2021 at 17:46

To: Emily McAlister <emily@retirement.capital>, emma stevens <emmajayne1982@outlook.com>, sue stevens <sue12\_12@hotmail.com>

Hi Vikki

This information will have been provided late last year as the scheme accounts are made up to 31 August.

I attach the accountants scheme accounts and investment valuation for your information.

Regards,

Simon Carlin

**The Lost Coin Financial Planning Ltd** ... *"finding true wealth"*

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## 2 attachments



**200831 OMW val & history Micron 1996 EPS.pdf**  
158K



**200831 Micron 1996 Executive Pension Scheme - Accounts.pdf**  
100K