



Emily McAlister <emily@retirement.capital>

NEW COMMERCIAL LAND AND OFFICES PURCHASE - MILLSTONE SSAS14 messages

Adrian Shakespeare <adrian@stratfordcollins.co.uk>

26 June 2023 at 16:57

To: Emily McAlister <emily@retirement.capital>

Cc: Sarah Thomas <sarah@stratfordcollins.co.uk>

Hi Emily,

Hope you are well, please find attached information and draft documentation in connection with the above scheme. The clients are looking to buy the commercial land and offices that the business currently trades from in to the SSAS and then lease it back to the Company. Can you please advise that we are OK to proceed with the purchase, what if any additional requirements you have and what your costs are to facilitate the purchase.

Regards

Many Thanks

Adrian Shakespeare Dip PFS, Certs CII (MP & ER)
Managing Director

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Registered in England and Wales No. 5951675.

 **RC - Purchase Proposal - Land at Brynna Mill.pdf**
3188K

Emily McAlister <emily@retirement.capital>
To: Adrian Shakespeare <adrian@stratfordcollins.co.uk>
Cc: Sarah Thomas <sarah@stratfordcollins.co.uk>

26 June 2023 at 17:14

Hi Adrian,

I will pass this to Tony now to review and get back to you as soon as possible.

Thanks

Kind Regards
Emily McAlister

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Phone: 0330 311 0088

Email: emily@retirement.capital

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Emily McAlister <emily@retirement.capital>
To: Tony McCartney <tonym@retirement.capital>

26 June 2023 at 17:15

Hi Tony,

Please see the email and attachment from Adrian.

Will you review this request please and get back to me with your thoughts/any additional requirements.

Thank you.

Kind Regards
Emily McAlister

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 **RC - Purchase Proposal - Land at Brynna Mill.pdf**
3188K

Adrian Shakespeare <adrian@stratfordcollins.co.uk>
To: Emily McAlister <emily@retirement.capital>
Cc: Sarah Thomas <sarah@stratfordcollins.co.uk>

26 June 2023 at 17:19

Thanks Emily much appreciated

Many Thanks

Adrian Shakespeare Dip PFS, Certs CII (MP & ER)
Managing Director

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[Quoted text hidden]

Tony McCartney <tonym@retirement.capital>
To: Emily McAlister <emily@retirement.capital>

29 June 2023 at 12:44

hi emily

i'm fairly comfortable with this. just a couple of queries:

is the property vat registered/opted in?

are they arranging for an epc to be done? can they provide a copy once done/if there is a valid one already in place

they appear to have plenty of cash in hand, but is this going to be a direct cash purchase, or do they intend to borrow to help fund the purchase?

is the building presently insured? Have enquiries been made to insure the property on exchange/completion?

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Web. <https://retirement.capital>

[Quoted text hidden]

Emily McAlister <emily@retirement.capital>
To: Tony McCartney <tonym@retirement.capital>

29 June 2023 at 15:10

Thanks Tony.. let me get back to Adrian.

Kind Regards
Emily McAlister

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Emily McAlister <emily@retirement.capital>
To: Adrian Shakespeare <adrian@stratfordcollins.co.uk>
Cc: Sarah Thomas <sarah@stratfordcollins.co.uk>

29 June 2023 at 15:12

Hi Adrian,

Tony has reviewed this and has a few questions below:

Is the property vat registered/opted in?

Are they arranging for an epc to be done? can they provide a copy once done/if there is a valid one already in place

They appear to have plenty of cash in hand, but is this going to be a direct cash purchase, or do they intend to borrow to help fund the purchase?

Is the building presently insured? Have enquiries been made to insure the property on exchange/completion?

Kind Regards
Emily McAlister

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On Mon, 26 Jun 2023 at 16:57, Adrian Shakespeare <adrian@stratfordcollins.co.uk> wrote:

[Quoted text hidden]

Adrian Shakespeare <adrian@stratfordcollins.co.uk>

29 June 2023 at 15:29

To: Emily McAlister <emily@retirement.capital>

Cc: Sarah Thomas <sarah@stratfordcollins.co.uk>

Hi Emily,

Thanks for this, answers below:-

Is the property vat registered/opted in? **No it is not**

Are they arranging for an epc to be done? can they provide a copy once done/if there is a valid one already in place? **Yes an EPC has been booked as part of the purchase process and can be supplied upon receipt.**

They appear to have plenty of cash in hand, but is this going to be a direct cash purchase, or do they intend to borrow to help fund the purchase? **This will be a direct cash purchase.**

Is the building presently insured? Have enquiries been made to insure the property on exchange/completion? **Enquiries are being made to insure the property on behalf of the scheme in preparation for exchange of contracts.**

Let me know if this is OK to proceed and I will fire over the additional items above as we receive them.

Much appreciated.

Many Thanks

Adrian Shakespeare Dip PFS, Certs CII (MP & ER)
Managing Director

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From: Emily McAlister <emily@retirement.capital>
Sent: Thursday, June 29, 2023 2:12 PM
To: Adrian Shakespeare <adrian@stratfordcollins.co.uk>
Cc: Sarah Thomas <sarah@stratfordcollins.co.uk>

[Quoted text hidden]

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Emily McAlister <emily@retirement.capital>
To: Tony McCartney <tonym@retirement.capital>

29 June 2023 at 15:41

Hi Tony,

In response to your queries:

Is the property vat registered/opted in? **No it is not**

Are they arranging for an epc to be done? can they provide a copy once done/if there is a valid one already in place? **Yes an EPC has been booked as part of the purchase process and can be supplied upon receipt.**

They appear to have plenty of cash in hand, but is this going to be a direct cash purchase, or do they intend to borrow to help fund the purchase? **This will be a direct cash purchase.**

Is the building presently insured? Have enquiries been made to insure the property on exchange/completion? **Enquiries are being made to insure the property on behalf of the scheme in preparation for exchange of contracts.**

Let me know if this is OK to proceed and I will fire over the additional items above as we receive them.

Much appreciated.

Kind Regards
Emily McAlister

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On Thu, 29 Jun 2023 at 12:45, Tony McCartney <tonym@retirement.capital> wrote:

[Quoted text hidden]

Tony McCartney <tonym@retirement.capital>
To: Emily McAlister <emily@retirement.capital>

29 June 2023 at 16:45

aye, fine. they can crack on

[Quoted text hidden]

Emily McAlister <emily@retirement.capital>
To: Adrian Shakespeare <adrian@stratfordcollins.co.uk>
Cc: Sarah Thomas <sarah@stratfordcollins.co.uk>

29 June 2023 at 16:50

Hi Adrian,

Tony has confirmed this is fine to proceed.

I will wait to hear from you.

Thank you.

Kind Regards
Emily McAlister

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[Quoted text hidden]

Adrian Shakespeare <adrian@stratfordcollins.co.uk>

30 June 2023 at 14:52

To: Emily McAlister <emily@retirement.capital>

Much Appreciated.

[Quoted text hidden]

Adrian Shakespeare <adrian@stratfordcollins.co.uk>

4 July 2023 at 17:16

To: Emily McAlister <emily@retirement.capital>

Cc: Sarah Thomas <sarah@stratfordcollins.co.uk>

Hi Emily,

Please find attached the signed executed documents and payment authority. They are hoping to complete next week.

If you need anything else let me know.

Regards.

[Quoted text hidden]

4 attachments

 **Signed Solicitors Terms.pdf**
1203K

 **Signed RC Disclaimer.pdf**
262K

 **Signed SSAS Resolution.pdf**
315K

 **Signed Transfer Authority.pdf**
410K

Adrian Shakespeare <adrian@stratfordcollins.co.uk>
To: Emily McAlister <emily@retirement.capital>
Cc: Sarah Thomas <sarah@stratfordcollins.co.uk>

7 July 2023 at 10:57

Morning Emily,

The solicitors have been in touch, they have scheduled completion for Monday, are Metro Bank able to send the funds over today?

Regards

Many Thanks

Adrian Shakespeare Dip PFS, Certs CII (MP & ER)
Managing Director

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