



Galina Williams &lt;galina@retirement.capital&gt;

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## Fwd: Only 4 U Retirement Benefits Scheme - Scheme tax return 2022 - information required

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Vikki Whitby <vikki@retirement.capital>  
To: Galina Williams <galina@retirement.capital>

27 October 2022 at 12:38

Hi Galina

Please see the response from the client, I hope this makes some sense?

Kind Regards  
Vikki Whitby



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

From: **Kishor Shah** <[kishor@only4ultd.co.uk](mailto:kishor@only4ultd.co.uk)>

Date: Thu, 27 Oct 2022 at 10:01

Subject: RE: Only 4 U Retirement Benefits Scheme - Scheme tax return 2022 - information required

To: Vikki Whitby <[vikki@retirement.capital](mailto:vikki@retirement.capital)>

Hi Vikki

Sorry for some confusion.

All the amounts from line 14 to 18, i.e. the value of shares is combined in the value I have put in line 12 which is under Walker Crips.

There is extra amount in HSBC India, and these are amounts transferred from S G Hambros

Likewise there is extra amount in Tilney, and this is transferred from S G Hambros.

Hope the above helps and if you have any other questions pls let me know

Kind Regards,

**Kishor Shah**

**Xpressions | Zak UK**

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**From:** Vikki Whitby <vikki@retirement.capital>

**Sent:** 27 October 2022 09:35

**To:** Kishor Shah <kishor@only4ultd.co.uk>

**Subject:** Re: Only 4 U Retirement Benefits Scheme - Scheme tax return 2022 - information required

Hi Kishor

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I have had the following query from our tax return team in relation to Only4U RBS.

According to the accounts where the last year was some amount and this year it's 0 - does it mean that this certain asset was disposed of? any vice versa - where was nothing and now there is amount - was it acquired?

Kind Regards

Vikki Whitby

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On Mon, 17 Oct 2022 at 15:44, Kishor Shah <[kishor@only4ultd.co.uk](mailto:kishor@only4ultd.co.uk)> wrote:

Hi Vikki

Pls see attached details for both the PZK Pension and the Only4U Retirement Scheme.

For Only 4 U Scheme pls look at the last columns.

Pls review and let me know if you have any questions?

Regards

Kishor

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**From:** Vikki Whitby <[vikki@retirement.capital](mailto:vikki@retirement.capital)>

**Sent:** 11 October 2022 12:06

**To:** Kishor Shah <[kishor@only4ultd.co.uk](mailto:kishor@only4ultd.co.uk)>

**Subject:** Only 4 U Retirement Benefits Scheme - Scheme tax return 2022 - information required

Dear Trustees,

So that we can prepare and submit your 2022 scheme tax return, please can you provide me with the following information:

1. Scheme bank account statements covering period 06.04.21 - 05.04.22 (**if you have an AIB/new Metro account, we will have your transactions so you don't need to take action on this point**)
2. Asset values as at 05 April 2022, 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

Web. <https://retirement.capital>

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