

Builders & Contractors

Reg No:04675773 England
Registered Office
Elledon House, Preston Road, Inskip, Preston, Lancs, PR4 OTT

Tel: 01772691139 Mobile: 07968119104 VAT Reg No.154 6264 63

Dear Gavin

Sorry for delay accountant had bank statements No movement has come out of the account except £10 a month bank charges and your fees Sorry again for delay if you need anything please ring me 079658119104

Yours sincerely

Graham Kirby



.com

Tel: 0800 634 4862 Fax: 020 8711 2522

Email: info@pensionpractitioner.com

Private and Confidential

Mr AKirby
R Kirby & Sons Limited
Elledon House
Preston Road
Inskip
Preston
PR4 0TT

31 August 2010

Dear Alan Cyrunger

Pension Scheme Event & Returns

We are required to submit an annual return and review of transactions for your pension scheme for the tax period 6th April 2009 to 5th April 2010.

We will also use this information to prepare your benefits statement(s) and bring you up to date with proposed changes to pension rules.

At this stage, we require a copy of your bank statements for all accounts in respect of the tax period to 5th April 2010. If you have a share portfolio, your broker has a statutory requirement to issue you with a tax certificate for the tax year to 5th April 2010; please provide us with a copy of that certificate.

If you have made loans from the pension scheme to your business, we will write to you separately regarding this.

It would also assist us if you could complete and sign the enclosed questionnaire. We will require this questionnaire back with the other data by 21 September 2010.

Thank you for your assistance

Yours sincerely

Gavin McCloskey
For Pension Practitioner .Com

Pension Scheme Return & Event Questionnaire

Information required for the pension scheme return

The scheme administrator is required to complete a pension scheme return for the tax year. We undertake this as part of our pension scheme service to the trustees. The return is over 11 pages long. In addition, there may be an event report due, presently there are over 16 different event reports that may arise.

We have condensed the information needed into a short questionnaire. Please check the appropriate box and return this form to us. If there are any parts of this form that you are unsure of please contact your scheme consultant.

1. Did the scheme have any interest tangible moveable property* 2. Did the scheme own or dispose of any shares in the sponsoring employer 3. Did the scheme acquire or own shares in an unquoted company, this excludes the sponsoring employer 4. Did the scheme acquire any assets from a connected party** directly or indirectly 5. Did any member take funds from the scheme – other than as pension income 6. Do you require a trustee meeting. If yes, this will be arranged on receipt

Notes:

*Tangible moveable property includes: Assets that you can touch and move, such as fine wines, machinery, works of art, assets that have a lifespan of less than 51 years e.g. patents.

**A connected party includes: A relative, a partner, co-director, or co trustee.

of the completed questionnaire

A connected party may also include a company that does not participate in the scheme but may be connected to you through the associations given above.

In order that we may prepare your benefit statement, we will require the total remuneration, inclusive of dividend income for each scheme member. Please give the name and remuneration below for income in respect of the tax year ending 5 th April 2010.	

***************************************	***********
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Scheme Name:	
Signed: Date:	
Please return this form to Pension Practitioner .Com Limited at:	
Daws House	
33-35 Daws Lane	

You can also email this form with other paperwork we may have requested you to provide in the cover letter to: post@pensionpractitioner.com

London NW7 4SD



01455018

Date

31 Dec

Current Account

Withdrawn Paid in Balance 31,107.79 10.00 31,097.79

Couldn't Sund Book they are Sor

Account Number 28509323 Branch sort code 01-03-33 National Westminster Bank Plc

TRUSTEES OF R KIRBY & SONS LTD SMALL SELF ADMINISTERED SCHEME



Current Account

Withdrawn Paid in

Balance

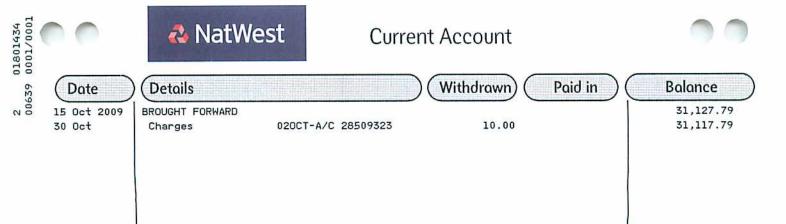
300CT-A/C 28509323

10.00

31,117.79 31,107.79

Account Number 28509323 Branch sort code 01-03-33 National Westminster Bank Pla

TRUSTEES OF R KIRBY & SONS LTD SMALL SELF ADMINISTERED SCHEME





Current Account

Paid in Balance Withdrawn)

10.00

31,137.79 31,127.79

Account Number 28509323 Branch sort code 01-03-33 National Westminster Bank Ple

TRUSTEES OF R KIRBY & SONS LTD SMALL SELF ADMINISTERED SCHEME

Current Account

BROUGHT FORWARD

31JUL-A/C 28509323

Withdrawn)

Balance

31,147.79

31,137.79

Paid in

10.00

Charges

Details

Date

00595250

2 00192

28 Aug

14 Aug 2009

TRUSTEES OF R KIRBY & SONS LTD

SMALL SELF ADMINISTERED SCHEME

Account Number 28509323 Branch sort code 01-03-33 National Westminster Bank Pla



Account Number 28509323 TRUSTEES OF R KIRBY & SONS LTD SMALL SELF ADMINISTERED SCHEME Branch sort code 01-03-33 National Westminster Bank Plc



