



R. Kirby & Sons Ltd

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

31 August 2010

Dear Alan

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.

Commencing on 6th April 2009 and ending on 5th April 2010

Yes No

- | | Yes | No |
|--|-----|-------------------------------------|
| 1. Did the scheme have any interest tangible moveable property* | | <input checked="" type="checkbox"/> |
| 2. Did the scheme own or dispose of any shares in the sponsoring employer | | <input checked="" type="checkbox"/> |
| 3. Did the scheme acquire or own shares in an unquoted company, this excludes the sponsoring employer | | <input checked="" type="checkbox"/> |
| 4. Did the scheme acquire any assets from a connected party** directly or indirectly | | <input checked="" type="checkbox"/> |
| 5. Did any member take funds from the scheme – other than as pension income | | <input checked="" type="checkbox"/> |
| 6. Do you require a trustee meeting. If yes, this will be arranged on receipt of the completed questionnaire | | <input checked="" type="checkbox"/> |

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.

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 5th April 2010.

.....

.....

.....

.....

.....

Scheme Name: _____

Signed: _____ Date: _____

Please return this form to Pension Practitioner .Com Limited at:

Daws House
33-35 Daws Lane
London
NW7 4SD

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

01455018
00452 0001/0001 NatWest

Current Account

Date	Details	Withdrawn	Paid in	Balance
15 Dec 2009	BROUGHT FORWARD			31,107.79
31 Dec	Charges	04DEC-A/C 28509323	10.00	31,097.79
<p>Couldnt find rest. But they are all the same.</p>				

Account Number 28509323

TRUSTEES OF R KIRBY & SONS LTD
SMALL SELF ADMINISTERED SCHEME

(66) Branch sort code 01-03-33

National Westminster Bank Plc

Date	Details	Withdrawn	Paid in	Balance
13 Nov 2009	BROUGHT FORWARD			31,117.79
30 Nov	Charges 300CT-A/C 28509323	10.00		31,107.79

Account Number 28509323

Branch sort code 01-03-33

National Westminster Bank Plc

TRUSTEES OF R KIRBY & SONS LTD
SMALL SELF ADMINISTERED SCHEME

01801434
00639 0001/0001



Current Account

Date	Details	Withdrawn	Paid in	Balance
15 Oct 2009	BROUGHT FORWARD			31,127.79
30 Oct	Charges 020CT-A/C 28509323	10.00		31,117.79

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

TRUSTEES OF R KIRBY & SONS LTD
SMALL SELF ADMINISTERED SCHEME

00611404
2 00194 0001/0001

Current Account

Date	Details	Withdrawn	Paid in	Balance
15 Sep 2009	BROUGHT FORWARD			31,137.79
30 Sep	Charges 28AUG-A/C 28509323	10.00		31,127.79

00595250
00192 0001/0001 NatWest

Current Account

Date	Details	Withdrawn	Paid in	Balance
14 Aug 2009	BROUGHT FORWARD			31,147.79
28 Aug	Charges 31JUL-A/C 28509323	10.00		31,137.79

62

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

TRUSTEES OF R KIRBY & SONS LTD
SMALL SELF ADMINISTERED SCHEME

01840194
0001/0001
2 00676

Current Account

Date	Details	Withdrawn	Paid in	Balance
15 Jul 2009	BROUGHT FORWARD			31,157.79
31 Jul	Charges 03JUL-A/C 28509323	10.00		31,147.79

Account Number 28509323

TRUSTEES OF R KIRBY & SONS LTD
SMALL SELF ADMINISTERED SCHEME

61

Branch sort code 01-03-33

National Westminster Bank Plc

00625444
0001/0001
2 00199

Current Account

Date	Details	Withdrawn	Paid in	Balance
15 Jun 2009	BROUGHT FORWARD			31,167.79
30 Jun	Charges 29MAY-A/C 28509323	10.00		31,157.79

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

TRUSTEES OF R KIRBY & SONS LTD
SMALL SELF ADMINISTERED SCHEME

01768257
00546 0001/0001

Current Account

Date	Details	Withdrawn	Paid in	Balance
15 Apr 2009	BROUGHT FORWARD			31,187.79
30 Apr	Charges 03APR-A/C 28509323	10.00		31,177.79

Account Number 28509323

58 Branch sort code 01-03-33

National Westminster Bank Plc

TRUSTEES OF R KIRBY & SONS LTD
SMALL SELF ADMINISTERED SCHEME