



Emily McAlister &lt;emily@retirement.capital&gt;

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**Fwd: Rutherford Pension Plan - Tax Return Data Request**

1 message

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**Emily McAlister** <emilym@pensionpractitioner.com>  
To: Emily McAlister <emily@retirement.capital>

1 June 2021 at 13:11

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

From: **Rosi Cullen** <rosi.cullen@btconnect.com>  
Date: Fri, 28 May 2021 at 14:00  
Subject: RE: Rutherford Pension Plan - Tax Return Data Request  
To: Emily McAlister <emilym@pensionpractitioner.com>

Hi Emily,

Please find attached the following documents for the RPP scheme return –

- RPP financial statement for tax year 2020-21.
- Brewin Dolphin summary valuation at 5/4/21.

I did not take any payment from the Scheme in the last financial year.

Property is as per last year's valuation. No 24 and No 50 were occupied throughout the year. The tenant in No 14/16 vacated at the end of Sept 2020 and a new tenant moved in at the beginning of March 2021.

When you make the return could you please send me a copy of the official return document for my records.

If you need any further information, please let me know.

Hope you have a nice weekend.

Kind regards

Rosi

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**From:** Emily McAlister <emilym@pensionpractitioner.com>  
**Sent:** 27 May 2021 11:08  
**To:** Neil and Rosi Rutherford <rosi.cullen@btconnect.com>  
**Subject:** Rutherford Pension Plan - Tax Return Data Request

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
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

Emily McAlister  
Administrator

*Please note our new administration and post processing centre:*

Pension Practitioner

Office 12

Venture Wales Building

Pentrebach

Merthyr Tydfil

CF48 4DR

T: 0800 634 4862

F: 020 8711 2522

Pension Practitioner is a tradestyle of The Practitioners Partnership LP

Registered Number: 00159

Registered Office: 1st Floor, World Trade Centre, Baytree Road, Gibraltar GX11 1AA

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Kind Regards

Emily McAlister  
Administrator

*Please note our new administration and post processing centre:*

Pension Practitioner  
Office 12  
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Pentrebach  
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**3 attachments**

 **APRIL 2021 -2022 Rutherford Pension Plan - financial position V1 (Summary and Detail) - April 2021 - March 2022.xlsx**  
22K

 **RPP - Brewin Dolphin valuation 5.4.21 - 1.PDF**  
300K

 **RPP - Brewin Dolphin valuation 5.4.21 - 2.PDF**  
389K