



Esther S <esther@pensionpractitioner.com>

RE: SPM - Review Valuation

1 message

Mo Johnson <Mo.Johnson@tilney.co.uk>
To: Esther S <esther@pensionpractitioner.com>
Cc: Stacy Lunnon <stacyl@pensionpractitioner.com>

6 December 2018 at 15:49

Hi Esther,

The value for Lloyds account as at 19/11/2018 £350,960.36.

Thanks,

Mo

From: Esther S <esther@pensionpractitioner.com>
Sent: 06 December 2018 13:51
To: Mo Johnson <Mo.Johnson@Tilney.co.uk>
Cc: Stacy Lunnon <stacyl@pensionpractitioner.com>
Subject: Re: SPM - Review Valuation

Thanks Mo.

Kind Regards

Esther Salmon
Administrator

Please note that from 1st September 2017 our address has changed to:

Pension Practitioner
48 Chorley New Road
Bolton
BL1 4AP

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

IMPORTANT - PLEASE NOTE The information transmitted is intended only for the person or entity to which it is addressed and may contain confidential and/or privileged material. Any review, retransmission, dissemination or other use of or taking of any action in reliance upon this information by persons or entities other than the intended recipient is prohibited. If you received this in error please contact the sender and destroy this email.

On Wed, 5 Dec 2018 at 17:38, Mo Johnson <Mo.Johnson@tilney.co.uk> wrote:

Hi Esther,

I have contacted the accountant at SPM to request a bank statement for the Lloyds bank account. I can fill in the gaps here if Hayley from SPM is able to provide.

In respect of the Tilney holding I can confirm that the value is:

Petrobras Shares (Execution only account) - £51,223.88

BIBUCSPM - £599,363.35

Many thanks,

Mo

From: Esther S <esther@pensionpractitioner.com>
Sent: 05 December 2018 15:55
To: Mo Johnson <Mo.Johnson@Tilney.co.uk>
Cc: Stacy Lunnon <stacyl@pensionpractitioner.com>
Subject: Re: SPM - Review Valuation

Hi Mo,

Thanks for your email and for your time on the phone earlier.

Please may I trouble you for an up to date figure for Lloyds TSB and the Tilney investment.

Thanks again for your help.

Kind Regards

Esther Salmon
Administrator

Please note that from 1st September 2017 our address has changed to:

Pension Practitioner
48 Chorley New Road
Bolton
BL1 4AP

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

IMPORTANT - PLEASE NOTE The information transmitted is intended only for the person or entity to which it is addressed and may contain confidential and/or privileged material. Any review, retransmission, dissemination or other use of or taking of any action in reliance upon this information by persons or entities other than the intended recipient is prohibited. If you received this in error please contact the sender and destroy this email.

On Mon, 3 Dec 2018 at 16:08, Mo Johnson <Mo.Johnson@tilney.co.uk> wrote:

Hi Ester,

I hope all is good with you?

Clients are due a review next week, please can you provide updated values, additional comments to support the meeting:

Cash Holdings

Metro Bank Account

Lloyds TSB

Barclays Petroleo Shares

Property

Globe Lane

Unit 4 Tameside

Loan

Details of contributions

Any additional BCE from those stated?

Contribution earmarking

I have attached a copy of our review documents as may be easier for you to update this way?

Many Thanks,

Mo

Mo Johnson

Interim Team Leader

Tilney Financial Planning Ltd

3rd Floor, Vantage Point
Hardman Street

Manchester

M3 3HF

T: 0161 819 7145

E: Mo.Johnson@Tilney.co.uk

tilney.co.uk

PLANNING | ADVISING | INVESTING

Tilney is a trading name for: Tilney Investment Management Services Ltd (Reg. No: 2830297), Tilney Discretionary Investment Management Ltd (Reg. No: 02519968), Tilney Investment Management (Reg. No: 02010520), Tilney Asset Management Ltd (Reg. No: 03900078), Tilney Asset Management Services Ltd (Reg. No: 03691998), Tilney Discretionary Portfolio Management Ltd (Reg. No: 00793636), Thurleigh Investment Managers LLP (Reg. No: OC309191), Tilney Financial Planning Ltd (Reg. No: 607039), Bestinvest (Consultants) Ltd (Reg. No: 01550116) and HW Financial Services Ltd (Reg. No: 02030706), each of which is authorised and regulated by the Financial Conduct Authority and a subsidiary of Tilney Group Ltd (Reg. No: 08741768). All registered in England and Wales with registered office: 6 Chesterfield Gardens, Mayfair, London W1J 5BQ. Further details are available at www.tilney.co.uk/registered-details.

This email is for the information of the addressee only and should not be reproduced and/or distributed to any other person. This email may be sent on behalf of any of the above-named companies and should be considered a financial promotion on all occasions where the contents of this email could be considered to be an invitation to engage in an investment activity. Past performance is not a guide to future performance. This e-mail is subject to terms and risk warnings available at www.tilney.co.uk/email-terms-and-conditions. By communicating electronically with us, you consent to these terms.

If you received this email in error, please accept our apology. We would be obliged if you would email contact@tilney.co.uk

Please note that this email and any attachments have been scanned by MessageLabs Email Security System for the presence of computer viruses. However, it is the responsibility of the recipient to ensure that it is virus free, and no responsibility is accepted by the Group for any loss or damage in any way arising from its use.

