



Veronica Walkman &lt;veronica@retirement.capital&gt;

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**SPM SSAS - Scheme tax return information required**

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

To: Veronica Walkman &lt;veronica@retirement.capital&gt;, Tony McCartney &lt;tonym@retirement.capital&gt;

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

17 December 2021 at 12:

TM Tracey McQuinn  
<[Tracey.McQuinn@Tilney.co.uk](mailto:Tracey.McQuinn@Tilney.co.uk)>

Reply all |

Yesterday, 15:21

Vikki Whitby <vikki@retirement.capital>; Mark Hinman <[mhinman@hwca.com](mailto:mhinman@hwca.com)>

Dear Vikki

Thank you for your email. Please find attached the following:

Account BISP0048

- Valuation as at 5/4/2021
- Transaction history 6/4/2020 to 5/4/2021
- Annual Tax Statement

Account BIBUCSPM

- Valuation as at 5/4/2021
- Transaction history 6/4/2020 to 5/4/2021
- Annual Tax Statement

Account BIBULTXO

- Valuation as at 5/4/2021
- Transaction history 6/4/2020 to 5/4/2021
- Annual Tax Statement

They also hold two properties within the SSAS. We have not received any update on the values for some time.  
The values we currently have on our systems are as follows:

- Globe Lane Industrial Estate - £363,147
- Unit 4 Tameside - £1,634,020

I have asked SPM if there is a more up to date value. I will confirm once they get back to me.

I have also asked them for the Lloyds Bank details.

Retirement Capital have access to the AIB bank information.

All loans have been repaid.

Please let me know should you require anything further.

Kind Regards  
Tracey

Kind Regards  
Vikki Whitby

Retirement  
.Capital












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Data Processing Centre  
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#### 9 attachments

-  **Annual Tax Statement 2021 - BIBUCSPM.pdf**  
64K
-  **BIBUCSPM Value as at 5.4.2021 (1).pdf**  
68K
-  **Annual Tax Statement 2021 - BISP0048 (1).pdf**  
95K
-  **BISP0048 Value as at 5.4.2021 (1).pdf**  
65K
-  **Annual Tax Statement 2021 XO Account - BIBLTXO.pdf**  
34K
-  **BIBULTXO Value as at 5.4.2021.pdf**  
65K
-  **BIBULTXO Transactions 6.4.2020 to 5.4.2021.xlsx**  
71K
-  **BISP0048 Transactions 6.4.20 to 5.4.21 (1).xlsx**  
80K
-  **BIBUCSPM Transactions 6.4.20 to 5.4.21.xlsx**  
99K