



Galina Williams <galina@retirement.capital>

Fwd: SPM SSAS - Tax return data

Emily McAlister <emily@retirement.capital>
To: Galina Williams <galina@retirement.capital>

28 July 2022 at 14:04

Is this helpful?

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

From: **Emily McAlister** <emily@retirement.capital>
Date: Fri, 21 Jan 2022 at 10:53
Subject: Fwd: SPM SSAS - Tax return data
To: gavin mccloskey <gavinm@retirement.capital>
Cc: Veronica Walkman <veronica@retirement.capital>

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

From: **Tracey McQuinn** <Tracey.McQuinn@tilney.co.uk>
Date: Fri, 21 Jan 2022 at 10:50
Subject: SPM SSAS
To: Emily McAlister <emily@retirement.capital>

Dear Emily

Please see response from Hayley below confirming that all (apart from the £250k) payments are for VAT payments.

The £250k was transferred to the scheme Tilney portfolio for investment.

I trust this answers your questions, however should you need anything further please let me know.

Thanks

Tracey

From: Hayley Muir <Hayleym@specialpipingmaterials.com>
Sent: 20 January 2022 16:19
To: Tracey McQuinn <Tracey.McQuinn@Tilney.co.uk>
Subject: RE: SPM SSAS

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Hi Tracey

The other transactions are all VAT return payments.

Kind regards

Hayley

From: Tracey McQuinn <Tracey.McQuinn@Tilney.co.uk>
Sent: 20 January 2022 15:59
To: Hayley Muir <Hayleym@specialpipingmaterials.com>
Subject: SPM SSAS

Dear Hayley

I hope you are well?

I have received the following email from Retirement Capital in relation to the scheme tax return.

I believe that the £250,000 was invested into the schemes Tilney account (BISP0048D) for investment, however I am unsure what the other amounts are for.

Please could you advise?

Kind Regards

Tracey

Tracey McQuinn

Senior Client Delivery Associate

Tilney Financial Planning Ltd



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From: Emily McAlister <emily@retirement.capital>
Sent: 20 January 2022 15:28
To: Tracey McQuinn <Tracey.McQuinn@tilney.co.uk>
Cc: Hayley Muir <hayleym@specialpipingmaterials.com>
Subject: SPM SSAS

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Dear Tracey,

We are just preparing the scheme tax return and have a couple of questions in connection with transactions from Lloyds Bank, that I hope you can help me with please.

Some payments were debited from the account, please confirm the beneficiaries of these payments and what they relate to.

01/05/20 £10579.36

24/07/20 £8841.28

23/10/20 £10000.00

30/11/20 £250000.00

01/02/21 £10000.00

I look forward to hearing from you.

Thank you

Emily

[Redacted]

[Redacted]

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Email: emily@retirement.capital

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Retirement.Capital

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7/28/22, 2:05 PM

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