



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>

5 December 2018 at 17:38

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

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F: 020 8711 2522

Pension Practitioner is a tradestyle of The Practitioners Partnership LP

Registered Number: 00159

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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



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