



Stacy Lunnon <stacyl@pensionpractitioner.com>

Re: {External} SPM SSAS - Calculations & Pension payment data Linda Buckley uncrystallised

Stacy Lunnon <stacyl@pensionpractitioner.com>

6 December 2017 at 16:29

To: Ann-Marie Atkins CFP Chartered MCSI FPFS <Ann-Marie.Atkins@tilney.co.uk>

Cc: Abbie Clegg <Abbie.Clegg@tilney.co.uk>, Esther S <esther@pensionpractitioner.com>

Hi Ann-Marie,

The fund splits are as follows:

Les Buckley £2,423,626.08

Linda Buckley £1,004,460.97 (crystallised)

Linda Buckley £71,869.94 (uncrystallised) 25% tax free cash remaining £17,967.48

Paul Buckley £292,577.49

Michelle King £52,378.61

(These figures are on the attached calculation spread sheet)

Based on the following asset values:

Metro Bank £82,819

Lloyds £198,194

Portfolio £548,040.72

Property £2,700,000

Loan £315,859.32

Linda is entitled to 25% tax free cash on the remaining uncrystallised fund of £17,967.48.

Les can take a one-off income payment, please confirm if this is £10,000 or £100,000 as this will effect the bank balance.

Due to the Metro Bank closure we need to transfer the funds to AIB. If the rental payments are set up by standing order, these payments will need to be updated with the new account number which we will have at the end of this week.

Kind regards,
Stacy Lunnon

Pension Practitioner
48 Chorley New Road
Bolton
BL1 4AP

T: 0800 634 4862

F: 020 8906 6611

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

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