



Galina Williams <galina@retirement.capital>

Fwd: Silvercrest Associates Ltd SSAS

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

7 September 2023 at 13:30

Hi Galina,

Data attached and also the request for our Trustee Report please.,

Thanks

Kind Regards
Emily McAlister

Retirement
.Capital



Web. <https://retirement.capital>

Phone: 0330 311 0088

Email: emily@retirement.capital

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On Tue, 5 Sept 2023 at 16:06, Mel Jones <meljones_silvercrest@hotmail.com> wrote:

Hi Emily,

I hope you are well.

It has now been 7 months since the Retirement Capitals Trustee Report for our SSAS has been promised for the year end 2022. It has not materialised.

Please will you expedite this.

I attach the Trustee's own YE report for YE April 2023 from which you will be able to extract the information for the submission to the revenue.

Please do so as soon as you can.

We are very concerned about the signature situation on the new Metro account. It is our understanding that somebody from your company is the sole signatory on the account. This is obviously not acceptable for a self administered pension scheme. Please would you expand on your thinking regarding the signatures.

Best Regards

Mel Jones, Ewa Jones

From: Emily McAlister <emily@retirement.capital>
Sent: 02 February 2023 09:37
To: Mel Jones <meljones_silvercrest@hotmail.com>
Subject: Silvercrest Associates Ltd SSAS

Dear Mel,

It was nice talking to you yesterday. Please see information below as promised.

1. Trustee Report ending April 2022

You are correct, the last report that you received was YE 2021. The YE 2022 report has not yet been prepared. In the meantime, please see a copy of your scheme tax return which has been successfully submitted to HMRC.

2. Loan roll over

We charge a fee of £500 for this to be prepared. Would you like me to proceed with your request of a 5 year roll over?

3. Email notifying you of the company changes

Please see below - this was emailed to you from my previous email address in May 2021.

I am pleased to announce that a range of new services will be available from 1 June 2021, including commercial pension mortgage, pension financing and asset preservation. These new services will complement our current pension administration and SSAS taxation services, which up until now have been provided under the business branding Pension Practitioner over the last 14 years.

From 1 June 2021 all our services will fall under one new branding called Retirement Capital, which will allow us to offer all of the above.

Retirement Capital will set a new benchmark in services for business owners with small self administered pension funds

and we have recently been awarded ISO 9001 and ISO 7001 status for quality management and information management. We are now one of only a small number of SSAS firms with both independent accreditations in the UK.

The change of branding from Pension Practitioner will simply mean that our phone and email addresses will change. Our

terms of business will also remain the same as before, as this is a branding change only. Everything else, including who looks after you will remain exactly the same.

Our phone number will be

0330 311 0088. You can still email us at Pension Practitioner for a while, but emails from us to you will come from our Retirement Capital accounts from 1 June. Our new email addresses will be **gavinm@retirement.capital** and **emily@retirement.capital**.

Gavin remains your Consultant and will also head the development of the technology which will power the tax reporting

and compliance for your SSAS, I will continue to look after your scheme administration and day to day help. My support team remains the same friendly faces as before!

We have opened a new Regus office in Soho Square for client meetings and consultancy one-to-one, as we appreciate that

Merthyr Tydfil is quite far for many clients living in the South and East of the UK.

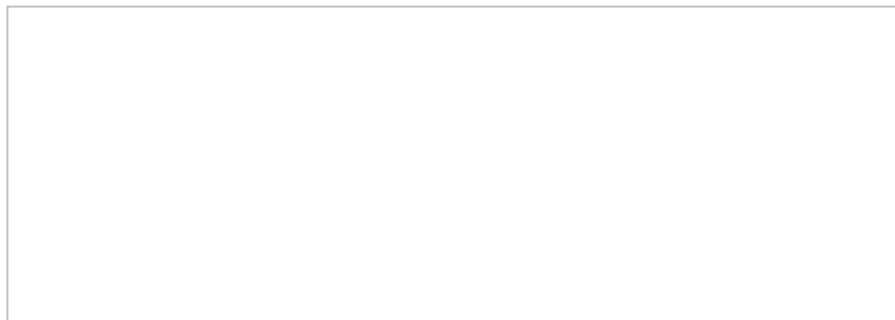
In the meantime, we really hope you like our new look and service offering. We also hope to continue to serve you for

many years to come. Please don't forget to visit our new website through this secure link:

<https://retirement.capital/>
which also has an emoji of each one of us and without face masks! 😊

4. Banking

Currently, we offer Metro Bank as a scheme banking facility. Below is the rates card.



Would you like me to arrange a call with Gavin to discuss other options?

I look forward to hearing from you.

Kind regards

Emily

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