



Stacy Lunnon <stacyl@pensionpractitioner.com>

request for data letter to Brown Shipley - Wisdom Pension Fund

Stacy Lunnon <stacyl@pensionpractitioner.com>

22 September 2017 at 11:33

To: ranjura@gsigroup.co.uk

Cc: Esther S <esther@pensionpractitioner.com>

Dear Ranju,

Further to our telephone conversation please find below the fund split prepared by our technical team for Mr and Mrs Wisdom based on the valuations of the Scheme as at 05 April 2017. Also attached is the fund split provided by Brown Shipley as at 23rd March 2010 at which point Pension Practitioner took over the administration functions of the Scheme.

As discussed, Kim has a share of the fund of 7.87% and is entitled to take tax free cash of up to 25% of her share. The share of funds cannot now be changed to 50/50, as Nick has already taken tax free cash up to the maximum allowable and so is fully crystallised.

Pru Policies £443,541
 Property Valuation £550,000
 Cash at bank £969
 Rental income received 6/4/16 to 5/4/17 £40,000
 Amount invested to Pru for the period 6/4/16 to 5/4/17 £80,000
 Total asset valuation as at 05 April 2017: £994,510

Here are the updated figures, based on the investment figures provided:

	Mr N Wisdom Crystallised 23/3/10	Mr N Wisdom Crystallised 4/10/07	Mr N Wisdom Crystallised 31/10/08	Mrs K Wisdom	Total
Fund Split	31.46%	37.72%	22.95%	7.87%	
Property	£173,030.00	£207,460.00	£126,225.00	£43,285.00	£550,000
Cash	£304.80	£365.45	£222.34	£76.25	£968.84
Investment	£139,537.96	£167,303.62	£101,792.64	£34,906.67	£443,540.89
Total	£312,872.76	£375,129.07	£228,239.98	£78,267.92	£994,509.73

Nick has already crystallised his entire fund, so he is not entitled to any more TFC. Kim is entitled to (25% of £78,267.92 =) £19,566.98.

If you have any questions please do not hesitate to contact me.

Kind regards,
 Stacy Lunnon

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On 8 May 2017 at 09:36, GSI <financialservices@gsigroup.co.uk> wrote:

Good morning Stacy

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