

Paul & Chandra Turtle  
Park Farm House  
Evesham Road, Greet  
Cheltenham GL54 5BX  
01242 620911

Brad Davis  
Pension Practitioner.com  
Daws House  
33-35 Daws Lane  
London NW7 4SD

Hammerhead Tv Pension Scheme no 2  
16<sup>th</sup> April 2013

Dear Brad,

Please find enclosed my duly completed SSAS takeover questionnaire with a valuation. I have tested my passwords to get into the Pension Regulator Exchange and to HMRC and as far as I can see I have included the relevant information. Please revert to me if there is anything missing as I have some unallocated perhaps historic passwords.

Please accept email copies of our deeds which include a certified copy PDF as well as a word copy for your convenience and also confirm the appropriate email address to send them to. The Deeds form a 69 page document, provided by Eversheds in 2007.

The pension is in fact very simple and the elements are shown in the valuation. I have electronic versions of the bank account, the investment accounts and the valuations of the properties should you wish to fill in more detail. There has not been a lot of input this year and the valuations of the commercial properties has decreased since 2010 although that may be because the fall in value post 2008 had not previously truly registered. The investments have reflected the uplift in the stock market.

In the past I have filed the returns to HMRC and to the Pensions Regulator. The commercial properties are Vat registered which I also manage.

My ambition now is to withdraw some money from the scheme whilst making sure that all regulations are adhered to in order to maintain the tax free status of the scheme. I am the administrator of the fund and both my wife and myself are the trustees and members.

4<sup>th</sup> February 2007 is the inaugural date of the scheme but I'm not sure if that applies as the effective date. It is at the start of the certified pdf copy of the deeds and stated as the effective date on page 1. "Pension Trust 2 addition" pdf is a one page file to correct the company registration number that is on the full deeds.

At the moment there are no loans outstanding that have been made by the scheme.

As far as I understand it, there is no need for a deed of removal of managers or trustees as my wife and I are trustees and members of the scheme which started with these deeds in 2007.

Please confirm that you have the information you need to proceed. I would like to be able to withdraw funds some time soon and will ring to get an idea of what needs to be done and what is the time scale. I would also like to know what part of your fee scales applies and I can then forward signed t&cs.

Kind regards

A handwritten signature in blue ink, appearing to read 'Paul8turtle', is written in a cursive style.

Paul8turtle@yahoo.co.uk



**Accountant's Details**

Name of Accountant

KEVIN FERGUSON

Email Address

kferguson@JRWCA.com

Telephone Number

01896753374

**Financial Advisor's Details**

Name of Financial Advisor

\_\_\_\_\_

Email Address

\_\_\_\_\_

Telephone Number

\_\_\_\_\_

**Scheme Details**

Government Gateway User ID  
Number

L4KS MF4N BVVU

Password

CHRYSLITE55

Pensions Regulator Number (PSR) 10275766

Pensions Regulator Exchange  
Key Code

NJCKBNB7BTQ8

Data Protection Registration  
Number


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**When returning this form we  
require the following:**

**A copy of the current Trust Deed  
and Rules**

**Most recent scheme accounts**

**We consent to the persons and companies named on this form to provide to Pension  
Practitioner .Com such information as is reasonably necessary in connection with this  
scheme.**

Signed 

Date 18<sup>th</sup> Apr 2013

Name C. TURTLE

Signed 

Date 18<sup>th</sup> April 2013

Name PAUL TURTLE

**Hammerhead tv Pension Scheme no 2**  
**End of year 2013 valuatiiion**

05/04/2013	Barclays Stockbrokers share acc	£ 61,291.12	
05/04/2013	Fidelity Personal Investing	£ 142,564.75	
05/04/2013	NatWest bank account	£ 21,719.78	
28/03/2013	Friendslife Policy Number: 7875896 Ex Sun Life	£ 8,731.71	
	Balance		£ 234,307.36
	Commercial property by valuation survey	£ 517,500.00	£ 517,500.00
	<b>Total value 5th April 2013</b>		<b>£ 751,807.36</b>
	No VAT outstanding		