



Stacy Lunnon <stacyl@pensionpractitioner.com>

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## Universal Group Executive Pension Fund

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**Mark Soper** <Marksoper@mdgifa.com>

6 November 2017 at 19:33

To: Stacy Lunnon <stacyl@pensionpractitioner.com>

Cc: "mark@kentsoper.co.uk" <mark@kentsoper.co.uk>, Marta DeGouveia

<MartaDeGouveia@mdgifa.com>, "bradd@pensionpractitioner.com" <bradd@pensionpractitioner.com>,

Ann Hester <AnnHester@mdgifa.com>

Hi Stacy

I hope you are well and I have a few items for you:

1. We have sent in an LOA to change the broker for this scheme from Kent Soper to MDG and Marta has been dealing with Esther on this. We still await confirmation from PP that you have updated the agency details from Kent Soper to MDG – I merged Kent Soper with MDG earlier this year – can you speak to Esther and expedite please.

2. The SSAS has received two transfers-in as shown below so the share allocation of the SSAS must be altered to reflect this:

Mrs Kimberley Lombard - £38,206.17 received by UGEPP on 18<sup>th</sup> August 2017

Miss Melissa Holland - £39,337.87 received by UGEPP on 18<sup>th</sup> August 2017

3. Two new Trustees/members have been appointed with effect from 1 November 2017, namely Mr Iain Craig and Mr Roger Best – I attach a copy of the signed trust deed and I will send you copies of their i.d. documents together with the original deed as soon as possible – Both Roger and Iain will be transferring in funds to the SSAS of apx £240,000 and £33,000 respectively and I will let you know when these transactions complete.

Best regards

Mark

Mark Soper ACII

Associate Director

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**From:** Stacy Lunnon [mailto:[stacyl@pensionpractitioner.com](mailto:stacyl@pensionpractitioner.com)]

**Sent:** 10 October 2017 17:54

**To:** Melissa Holland

**Cc:** David Coates; Mark Soper; [esther@pensionpractitioner.com](mailto:esther@pensionpractitioner.com)

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