



Galina Williams <galina@retirement.capital>

Watson Gym Pension Scheme - URGENT TAX RETURN DATA REQUEST

Galina Williams <galina@retirement.capital>
To: steve@watsongym.co.uk
Cc: Emily McAlister <emily@retirement.capital>

12 January 2023 at 11:38

Hi Steve,

Thank you for the information, I look forward to hearing from you about Investec.
Loan account I believe is 44382161, you can find the last statement that we have attached for your reference

Kind regards,
Galina

On Thu, 12 Jan 2023 at 11:25, <steve@watsongym.co.uk> wrote:

Hi Galina,

Simon is in Australia this week, so I'm getting information from him intermittently. I believe the Investec account was shut down with funds being transferred to the pension account but I need some backup to prove this.

Could you confirm which Barclays loan account no. you require and I can pull the statement straight away.

Kind regards,

Steve

From: Galina Williams <galina@retirement.capital>
Sent: 12 January 2023 08:57
To: steve@watsongym.co.uk
Cc: Emily McAlister <emily@retirement.capital>
Subject: Re: Watson Gym Pension Scheme - URGENT TAX RETURN DATA REQUEST

Thank you, Steve, for your reply.

May I please ask you some questions as well:

- could you please provide us with the information (some evidence) what happened with the Investec account (£438.72 in 2019)?

- also what is the balance of the Barclays loan account (or you may kindly provide us a copy of the statement for the reported period).

Look forward to hearing from you

Kind regards,

Galina

On Wed, 11 Jan 2023 at 17:04, <steve@watsongym.co.uk> wrote:

Hi Galina,

I'm sorry, I was sure this had been done already?

Pls find attached the bank statements as requested.

No adjustments have been made until the sale of unit B2/3 in Jun/Jul 2022, which would not affect these requirements.

Therefore please use prior year values, or if you can provide what was given to you last year, I can replicate.

Kind regards,

Steve

From: Galina Williams <galina@retirement.capital>
Sent: 11 January 2023 14:30
To: steve@watsongym.co.uk
Cc: Emily McAlister <emily@retirement.capital>
Subject: Watson Gym Pension Scheme - URGENT TAX RETURN DATA REQUEST

Dear Steve,

As per my colleague, Emily's previous request we still need some data in order to prepare and submit your tax return before the HMRC deadline which is the end of this month.

I would appreciate it if you would send me the following data by Monday 16th January:

1. Scheme bank account statements covering period 06.04.21 - 05.04.22
2. Asset values as at 05 April 2022, i.e. investments, property, shares, loans
3. Details of any assets purchased or disposed of during the period

I look forward to hearing from you.

Thank you

Galina

----- Forwarded message -----

From: **Emily McAlister** <emily@retirement.capital>

Date: Thu, 29 Sept 2022 at 14:17

Subject: Watson Gym Pension Scheme

To: <steve@watsongym.co.uk>

Dear Steve,

I hope you are well.

I just tried calling you but it goes to voicemail. I didnt leave a message as there is alot of background noise here, sorry.

Sorry I missed your call - how can I help you?

Can you send me details of the scheme covering period 06.04.21 - 05.04.22 please?

1. Scheme bank account statements covering period 06.04.21 - 05.04.22
2. Asset values as at 05 April 2022, i.e. investments, property, shares, loans
3. Details of any assets purchased or disposed of during the period

I look forward to hearing from you.

Thank you

Emily

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Watson Gym Loan Statement 280119.pdf

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