



Georgina Martin <georginam@retirement.capital>

Adrian Burns - ATB Fire PCLS

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To: Georgina Martin <georginam@retirement.capital>

Mon, Jun 24, 2024 at 4:25 PM

Hi Gina

Updated fund split attached. As of today :

Fund value : £296,989.73
Cash : £86,323.91
Investments : £210,665.82

Crystallised : £105,365.13 (35.478%)
Uncrystallised : £191,624.60 (64.522%)

I would suggest a crystallisation now of £72,000, for PCLS of £18,000.

This would give him £4,500 now, then £1,500/month for nine months (up to and including March 2025). From then on, do an annual crystallisation to cover the next twelve months (and so on) just after the end of the tax year so we'll have figures for both the crystallisation and the tax return.

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Web. <https://retirement.capital>

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ATB Fire Safety Fund Split - 24062024.xlsx
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