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BCS SSAS

3 messages

Brown, Jenny <Jenny.Brown@oaklandinnovation.com>

5 June 2018 at 11:27

To: Gavin <gavinm@pensionpractitioner.com>, Emily McAlister <emilym@pensionpractitioner.com>

Cc: Stephen Brown <stephen@artek-design-house.co.uk>

Hi Gavin/Emily,

An update on BCS SSAS.

We are working on the 2017/18 accounts statement for the tax return and intend to have it with you by the end of the month.

Stephen has started drawing down his tax free lump sum and I intend to start doing the same when I reach 55 in November. A couple of questions:

- 1) Is there anything specific we ought to be appraised of as we start to draw down?
- 2) We are aware that we need to create a PAYE scheme, and make the notification to HMRC each month when either of us take £ xxxk of tax free cash, using yyyy% of our respective lifetime allowance, providing us with an ongoing cumulative certificate showing the percentage of lifetime allowance used – is this something that you can help with or point us in the right direction?

Many thanks

Jenny

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