



Stacy Lunnon <stacyl@pensionpractitioner.com>

Charlcombe Homes Pension Fund - annual review

1 message

Stacy Lunnon <stacyl@pensionpractitioner.com>
To: Alastair Gibson <ag@charlcombe.com>

11 July 2019 at 12:32

Dear Alastair,

We would like to update our records and carry out an annual review of your scheme so that we can give some advice and updates regarding SSAS in general.

I note that you may have moved pension scheme accounts in 2017 and would kindly ask that you confirm which bank the pension scheme now holds an account with and if you could provide us with statements or a transaction history for this account up to 05 April 2019 that would be greatly appreciated.

We have on record two assets currently held in your pension scheme. We would appreciate an update on these, i.e. valuations and growth potential for the scheme going forward.

The two assets are:

1. Land at Frome which was purchased for £45,648 by cheque 000002 on 17/06/2013
2. Ithon Fishery Co Ltd purchased for £30,000 by cheque 000001 on 28/05/2013

I look forward to hearing from you.

Kind regards,
Stacy Lunnon

Please note our new administration and post processing centre:

Pension Practitioner
Office 12
Venture Wales Building
Pentrebach
Merthyr Tydfil
CF48 4DR

T: 0800 634 4862
F: 020 8906 6611

Check out our new administration management online platform: <https://retirement.capital/>

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