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Elljess Investments Ltd EPS

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23 February 2018 at 12:21

To: Dawn Hutchings <dawn@lucesco.co.uk>

Cc: Esther S <esther@pensionpractitioner.com>

Dear Dawn,

I am undertaking a review of the above scheme and will be providing you and the clients a trustee report shortly.

I am conscious that the value of Geoff's fund is over £1Million and cannot see that we have ever discussed the Lifetime allowance and putting protection in place for Geoff. Can you confirm if Geoff has any primary, enhanced or fixed protection in place?

I note that Geoff will be turning 55 in September of this year and if no protection is in place then we could make some suggestions so that he does not end up with a tax charge for funds over the lifetime allowance.

Kind regards,
Stacy Lunnon

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