



Emily McAlister <emilym@pensionpractitioner.com>

Evergreen Pension Scheme

3 messages

Emily McAlister <emilym@pensionpractitioner.com>
To: Alan Race <alanrace50@gmail.com>

10 December 2020 at 11:44

Hi Alan,

I hope that you and your family are well.

Can you please send me the following information please:

1. Detailed transaction history on the pension scheme bank account (**we have your AIB statements**)
2. Asset values as at 05 April 2020, i.e. investments, property, shares, loans
3. Details of any assets purchased or disposed of during the period

Any other information you feel may be beneficial and if possible a brief email outlining any movements within the scheme during the period and any other documentation, statements or other attachments that you feel would be relevant.

I look forward to hearing from you.

Thank you.

Kind Regards

Emily McAlister
Administrator

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 8711 2522

Pension Practitioner is a tradestyle of The Practitioners Partnership LP
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Registered Office: 1st Floor, World Trade Centre, Baytree Road, Gibraltar GX11 1AA

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Alan Race <alanrace50@gmail.com>
To: Emily McAlister <emilym@pensionpractitioner.com>

10 December 2020 at 12:32

Emily
Hi Emily.

With regard to recent email can confirm

1. All Pension transactions are recorded on the Pension account bank statements.
2. There have been no asset disposals or purchases since the last provision of information.
3. All assets should be considered to be of similar value as previously.

Regards
Alan Race

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Emily McAlister <emilym@pensionpractitioner.com>
To: Alan Race <alanrace50@gmail.com>

10 December 2020 at 12:32

Hi Alan,

Thank you for your email.

Take care,
Emily

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