



Galina Williams <galina@retirement.capital>

Fwd: Instant Pension Trust - Tax return data request 2023

Emily McAlister <emily@retirement.capital>
To: Galina Williams <galina@retirement.capital>

28 August 2023 at 13:06

Kind Regards
Emily McAlister

Retirement
.Capital



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----- Forwarded message -----

From: **Paul Jones** <pauldavidjones56@gmail.com>
Date: Fri, 25 Aug 2023 at 18:40
Subject: Re: Instant Pension Trust - Tax return data request 2023
To: Emily McAlister <emily@retirement.capital>

Hi Emily

Please see the details requested for the annual return as well as other valuations for the scheme.

Handelsbanken bank statements for the period of the return are attached.
CoFunds / Aegon valuation as at 05 April 2023 is attached.
Confirmation of Property valuations - Valuation of Greenwood Court now £320,000
Details of any acquisitions or disposals:-
2 Tennyson Road property was sold on 31st Jan 23. See attached Financial Statement. Funds were reinvested with Aegon Fund.

Please let me know if you require any further information.

On Mon, 19 Jun 2023 at 09:47, Emily McAlister <emily@retirement.capital> wrote:
Hi Paul,

No worries, thank you.

Kind Regards

Emily McAlister

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On Sun, 18 Jun 2023 at 18:53, Paul Jones <pauldavidjones56@gmail.com> wrote:

Hi Emily.

Not ignoring you but I am away until late July. I will get back to you on my return.

Thank you.

Paul

On Fri, 16 Jun 2023 at 15:44, Emily McAlister <emily@retirement.capital> wrote:

Dear Paul,

I hope you are well.

We would like to prepare your scheme tax return and require some information please:

- Handelsbanken - statements covering 06.04.22 - 05.04.23
- CoFunds/Aegon as at 05.04.23

I look forward to hearing from you.

Kind Regards
Emily McAlister

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3 attachments



Financial Statement.pdf

655K



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