



Galina Williams <galina@retirement.capital>

Fwd: Instant Pension Trust - Tax return data request 2024

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

30 January 2025 at 09:42

Kind Regards
Emily McAlister



Web. <https://retirement.capital>

Phone: 0330 311 0088

Email: emily@retirement.capital

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

From: **Paul Jones** <pauldavidjones56@gmail.com>

Date: Wed, 29 Jan 2025 at 18:01

Subject: Re: Instant Pension Trust - Tax return data request 2024

To: Emily McAlister <emily@retirement.capital>

Hello Emily,

Please find attached the documents requested and property valuation.

Please note that although not date accurate I have a valuation at 4th June 24 of £780325.25 and attached valuation on 1st March 2024 of £744,329.64 is this close enough?

The Property at Greenwood Court Valuation would be circa £330,000.

Kind regards,

PAul

On Tue, 28 Jan 2025 at 16:30, 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 06.04.23 - 05.04.24
- CoFunds/Aegon as at 05.04.24

I look forward to hearing from you.

Kind Regards
Emily McAlister

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2 attachments

 **img088.pdf**
6046K

 **Valuation.pdf**
64K