

RE: John A Dobbins Limited Self-Administered Scheme - Data Request

Inbox



Richard Johnson

to me, Katie

Good afternoon Emily

Thank you for your email.

The assets held by the Pension at 5.4.18 were:

Cofunds General Investment Account £354,040.50

Commercial Property £175,000.00

I can confirm that no assets were purchased or disposed of during this period.

You will also notice that during that accounting period Mr John Dobbins died. The account was then transferred to Mrs V L Dobbins ownership. All paperwork was produced and arranged by Pension Practitioner.

Regarding the bank transactions, only Pension Practitioner has access to the transaction history for the bank account. During this period the account was held with Metro Bank. I will be grateful if you can access this information and provide a copy for my records.

Please let me know if you require any additional information.

Many Thanks