



Emily McAlister <emilym@pensionpractitioner.com>

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**Re: Kaysted Ltd SSAS**

2 messages

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**Gavin** <gavinm@pensionpractitioner.com>

9 May 2018 at 18:22

To: Neil Budden <NBudden@chadneybulgin.co.uk>

Cc: "Stedman, Peter" <Peter.Stedman@loftshop.co.uk>, Emily McAlister <emilym@pensionpractitioner.com>

Hi Neil,

Sure, we can get this organised.

Can you provided me with a valuation of funds together with cash at bank. I will look at the last valuation we used for the trademark on the tax returns with hmrc and we will run the calculations this week.

Many thanks and congratulations to Peter and his family.

Regards

Gavin

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On 9 May 2018 at 17:41, Neil Budden <NBudden@chadneybulgin.co.uk> wrote:

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Hi Gavin,

Hope this finds you well.

Peter would like to draw £50k in Tax Free Cash from his pension as quickly as possible (Daughter's upcoming wedding) and it would be appreciated if you could provide details of what you will require, an estimated timescale and costs involved.

If you need any further details please let me know, otherwise look forward to hearing from you shortly.

Thanks and regards

Neil

Neil Budden APFS

Chartered Financial Planner

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Gavin <[gavinm@pensionpractitioner.com](mailto:gavinm@pensionpractitioner.com)>  
To: Neil Budden <[NBudden@chadneybulgin.co.uk](mailto:NBudden@chadneybulgin.co.uk)>

16 May 2018 at 13:16

Cc: "Stedman, Peter" <Peter.Stedman@loftshop.co.uk>, Emily McAlister <emilym@pensionpractitioner.com>

Hi Neil,

Many thanks for your email and sending the valuation data.

We have been in touch with bank of scotland and obtained an updated value of the cash at bank and in addition have checked the valuation of the trademark against the previous agreements.

Whilst the trademark's valuation is at £273,000 and does need to be updated for tax planning reasons I can confirm that the present available commencement lump sum is £189,019 for Peter and therefore £50,000 can be paid.

I would suggest that given the changes at Bank of Scotland that we open a same day trustee account with AIB and funds are remitted to Peter from that account for expediency. You will need to remit cash from the portfolio to the trustee account. Please let me know that this is acceptable and I will activate this today for Peter. I will need Peter's bank details to organise the payment.

With thanks

Gavin

[Quoted text hidden]