



Emily McAlister <emily@retirement.capital>

Re: Unallocated pension distribution LKL SASS

5 messages

gavin mccloskey <gavinm@retirement.capital>

1 June 2023 at 15:41

To: James Wring <james.wring@sjpp.co.uk>

Cc: George Gordon <george.gordon@lkl-services.co.uk>, Ivor <ivor@4xtrahands.com>, Simon Collier <simon.collier@lkl-services.co.uk>, Emily McAlister <emily@retirement.capital>

Hi Everyone,

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James can you confirm the valuation of the fund as at 6th April 2022 and 5 April 2023 so I can run the calculations.

Going forward, can you please ensure that Emily who helps manage my case load is copied in so I can ensure that you are all responded to in a more timely manner.

(James I will call you tomorrow as I have been travelling for the last 2 days).

Many thanks

Gavin

On Thu, May 11, 2023 at 3:05 PM James Wring <james.wring@sjpp.co.uk> wrote:

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Please note for Claire & Matt please continue to fund via the SASS for 23/24...

Also, please can you confirm our understanding that you have in past years fully funded all four members ?

Thanks

Jamie

James Wring DipPFS**Financial Adviser & Founder Member of St. James's Place Wealth Management****Eight Wealth Management Limited***Principal Partner Practice of St. James's Place Wealth Management*

1460 Parkway, Whiteley, Fareham, Hampshire, PO15 7AF

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From: George Gordon <george.gordon@lkl-services.co.uk>

Sent: Tuesday, May 9, 2023 2:27 PM

To: gavin mccloskey <gavinm@retirement.capital>

Cc: James Wring <james.wring@sjpp.co.uk>; Ivor <ivor@4xtrahands.com>; Simon Collier <simon.collier@lkl-services.co.uk>

Subject: Unallocated pension distribution

Hi Gavin

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Kind regards

George

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George Gordon <george.gordon@lkl-services.co.uk>

1 June 2023 at 16:06

To: [gavin mccloskey <gavinm@retirement.capital>](mailto:gavinm@retirement.capital)

Cc: James Wring <james.wring@sjpp.co.uk>, Ivor <ivor@4xtrahands.com>, Simon Collier <simon.collier@lkl-services.co.uk>, Emily McAlister <emily@retirement.capital>

Please ensure that Jamie fills you in on other pension payments made, in fairness I think just for current financial year.
Cheers
G

George Gordon
Managing Director
LKL Services Ltd
george.gordon@lkl-services.co.uk
07802 596868

On 1 Jun 2023, at 14:41, [gavin mccloskey <gavinm@retirement.capital>](mailto:gavinm@retirement.capital) wrote:

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James Wring <james.wring@sjpp.co.uk>

1 June 2023 at 16:28

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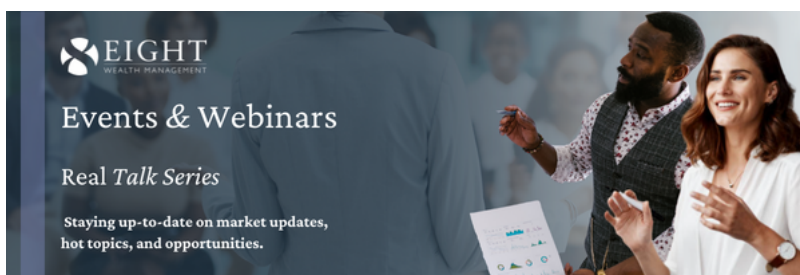


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Web. <https://retirement.capital> [retirement.capital]

Phone: 0330 311 0088

Email: gavinm@retirement.capital



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George Gordon <george.gordon@lkl-services.co.uk>

1 June 2023 at 16:40

To: James Wring <james.wring@sjpp.co.uk>

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I am intending LKL to make another payment to the scheme in the next month or two.

Ideally £420k same as last year.

Thanks

G

George Gordon

Managing Director

LKL Services Ltd

george.gordon@lkl-services.co.uk

07802 596868

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To: gavin mccloskey <gavinm@retirement.capital>
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1 June 2023 at 16:47

Gavin

As per below as you know we have two tranches, the original 800k that was invested on 24/11/21, and tranche 2 invested on 21/09/22.

Tranche 1 as of 6/4/22 £740,940.03

Tranche 2 NIL as not invested.

Tranche 1 as of 5/4/23 £711,262.41

Tranche 2 as of 5/4/23 £414,475.45

Please note the following.....

We need to allocate as much as we can from original Tranche to Ivor, Huw, Matt and Claire for previous tax years.... For 23/24 NIL for Ivor & Huw as LKL have max funded direct from business this tax year...

Also please note George wants to invest a further 420k from LKL into the SASS, is this possible ??

Can we talk at say 9.30am Friday ?

Thanks

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