



Georgina Stuliglowa <[georginas@pensionpractitioner.com](mailto:georginas@pensionpractitioner.com)>

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## Ros Altmann - Leo1929 SSAS

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**Peter Best** <[pbest@tag.uk.com](mailto:pbest@tag.uk.com)>

4 December 2020 at 10:17

To: Georgina Stuliglowa <[georginas@pensionpractitioner.com](mailto:georginas@pensionpractitioner.com)>

Hi Georgina,

We have a slight problem with Ros, it seems that when Liberty transferred her SIPP to the SSAS they gave you the wrong %age for the amount of LTA she had used.

I've attached the original letter from Liberty to Ros when she crystallised part of the fund which confirms the date as 30<sup>th</sup> March 2016 and the LTA used as 27.1% not the 33.83% that they put in their transfer letter. This was the only crystallisation that she has done.

What do we need to going forward to ensure that the records are correct?

Yours sincerely

**Peter Best** BSc (Hons) PETR DipPFS CertLTCP Cert CII (Life and Pensions) EFA MLIBF

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**Partner: D Thompson DipFA MLIBF & A R M Young DipFA**

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**2016-04-06 - Letter from Liberty confirming Crystallisation Date and LTA used.pdf**  
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