



Galina Williams <galina@retirement.capital>

Fwd: FW: Mr Philip Buckingham Re Lucy Bee SSAS (SCC926743)

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

30 November 2022 at 16:56

Hi Galina,

Everything in for Lucy Bee tax return now.

Thanks
Emily

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

From: **Mark Begg** <Mark@mb-asset.co.uk>
Date: Wed, 30 Nov 2022 at 15:54
Subject: FW: Mr Philip Buckingham Re Lucy Bee SSAS (SCC926743)
To: Emily McAlister <emily@retirement.capital>
Cc: Philip Buckingham <phil@lucybee.com>

Just came in!

Best regards

Mark



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From: AJ Bell Investcentre Enquiry <enquiry@investcentre.co.uk>
Sent: 30 November 2022 14:31
To: Mark Begg <Mark@mb-asset.co.uk>
Subject: RE: Mr Philip Buckingham Re Lucy Bee SSAS (SCC926743)

Dear Mark

Thank you for your email.

Please see the below for a total policy valuation as at 05.04.2022:

- DA Cash: £965.81
- DA Portfolio: £274,625.83
- Total: £275,591.64

If you have any questions or require anything further please do not hesitate to contact me.

Yours sincerely

Chloe D'Eath

Adviser Support Team

AJ Bell Investcentre Enquiry | Adviser Support Team

Mob: | **Tel:** 0345 83 99 060

Website: www.investcentre.co.uk

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