



Stacy Lunnon <stacyl@pensionpractitioner.com>

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## TFC payments - MGI 1 RS

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Adam Holmes <adam@carltonjames.co.uk>

15 June 2017 at 12:39

To: Stacy Lunnon <stacyl@pensionpractitioner.com>

Cc: Emily McAlister <emilym@pensionpractitioner.com>, David Nicklin <davidn@pensionpractitioner.com>

Morning Stacey

I'm well thank you, as you say, we are all shook up at the unforeseen event of Brads passing. We can only offer you our condolences at this time of bereavement as I'm sure, as his close family and friends, you are all struggling to come to terms with matters; I hope that soon the pain will pass and that you will be able to smile upon the fond memories that you have gathered over the years – as will we.

On clarification of your points, recently additional transfers have come into the pension scheme, although they are not reflected through the bank statement. As per our previous meetings, I know David is aware, we facilitate pension transfers via Transact where we transfer 90% of the client funds keeping a residual 10% on the regulated platform that at a later date will be transferred into a sub trust account under the pension scheme. Therefore, these PCLS payments are effectively the remaining PCLS available following the attachment of the sub trust to the Pension scheme; I hope this makes sense. So therefore, yes, following these payments they have had their 25% tax free cash.

Any questions please let me know.

Kind Regards

Adam Holmes

Paraplanner



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