



Galina Williams <galina@retirement.capital>

Matlock Ford - Tax return 2023

Georgina Martin <georginam@retirement.capital>
To: Galina Williams <galina@retirement.capital>

12 December 2023 at 16:35

Tax return data below and attached.

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

From: **Peter Best** <PeterBest@tpllp.com>
Date: Tue, Dec 12, 2023 at 12:18 PM
Subject: Re: Matlock Ford - Tax return 2023
To: Georgina Martin <georginam@retirement.capital>

Hi Georgina,

The TP valuation should be attached.

The Quilter plan was closed and the funds moved to the TP plan.

We have been unable to get an updated valuation for the Tulip shares, please assume that the value hasn't changed.

Thanks

Kind regards

Peter Best *BSc (Hons) AdvDipFA PETR DipPFS CertLTCP CertsCII (L&P, FS & MP) EFA Ch.ALIBF*

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From: Georgina Martin <georginam@retirement.capital>
Sent: 06 December 2023 12:45
To: Peter Best <PeterBest@tpllp.com>
Cc: Galina Williams <galina@retirement.capital>
Subject: Matlock Ford - Tax return 2023

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TP GIA Valuation as at 5th April 2023.pdf
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