

Galina Williams <galina@retirement.capital>

Fwd: Maurice Company Directors Retirement Plan

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

20 September 2023 at 11:02

Kind Regards Emily McAlister







Web. https://retirement.capital Phone: 0330 311 0088 Email: emily@retirement.capital

Data Processing Centre
Retirement.Capital
Venture Wales Building
Merthyr Tydfil Industrial Business Park
Merthyr Tydfil
Wales
CE48 4DR

Any statement or advice given in this email or any other correspondence by Retirement Capital, its employees or consultants on any subject not covered by a signed terms of engagement is given without liability for any advice or mis-statement. This E-mail and any attachments to it are strictly confidential and intended solely for the addressee. It and they may contain information which is covered by professional or other privilege. If you are not the intended addressee, you must not disclose, forward, copy or take any action in reliance on this email or its attachments. If you have received this email in error, please notify the sender at data@retirement.capital as soon as possible and delete this email immediately and destroy any hard copies of it.

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

From: Peter Winter < Peter. Winter@hjsfinancialplanning.co.uk>

Date: Tue, 19 Sept 2023 at 17:30

Subject: Re: Maurice Company Directors Retirement Plan

To: Emily McAlister <emily@retirement.capital>

Hi Emily,

The valuations are below

AXA Tip (Laurence) as at 05/04/2023 - £132,207.64

Quilter (Brenda) as at 05/04/2023 - £19,405.80.

Thanks

Peter Winter FPFS, ER, CeMAP

Chartered Financial Planner

t: 023 8144 7788 office: 023 8092 0128 www.hjssolutions.co.uk



HEAD OFFICE: First Floor, Tagus House, 9 Ocean Way, Southampton, SO14 3TJ

HJS Financial Planning Limited is a limited company registered in England and Wales No. 06976226.

HJS Financial Planning Ltd are authorised and regulated by the Financial Conduct Authority. HJS Financial Planning Ltd is entered on the FCA register under reference 755721. Email communications are not secure. For this reason HJS Financial Planning Ltd cannot guarantee the security of the email or its contents or that it remains virus free once

Please note that the company may monitor email traffic data and also the content of email for the purposes of security and staff training.

This message contains confidential information and is intended only for the intended recipients. If you are not an intended recipient you should not disseminate, distribute or copy this e-mail. Please notify immediately by e-mail if you have received this e-mail by mistake and delete this e-mail from your system. E-mail transmission cannot be guaranteed to be secure or error-free as information could be intercepted, corrupted, lost, destroyed, arrive late or incomplete, or contain viruses. We therefore do not accept liability for any errors or omissions in the contents of this message, which arise as a result of e-mail transmission. If verification is required please request a hard-copy version.

Registered Office: 12-14 Carlton Place, Southampton, Hampshire SO15 2EA.

From: Emily McAlister <emily@retirement.capital>

Date: Friday, 15 September 2023 at 14:38

To: Peter Winter <Peter.Winter@hjsfinancialplanning.co.uk>

Subject: Maurice Company Directors Retirement Plan

Hi Peter

Will you please send me the valuations as at 05.04.23 for:

Friends Life/OMW

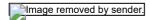
AXA

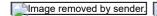
I will need copies of the above please.

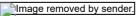
Thank you.

Kind Regards

Emily McAlister







Web. https://retirement.capital

Phone: 0330 311 0088

Email: emily@retirement.capital

Data Processing Centre

Retirement.Capital

Venture Wales Building Merthyr Tydfil Industrial Business Park Merthyr Tydfil Wales CF48 4DR

Any statement or advice given in this email or any other correspondence by Retirement Capital, its employees or consultants on any subject not covered by a signed terms of engagement is given without liability for any advice or mis-statement. This E-mail and any attachments to it are strictly confidential and intended solely for the addressee. It and they may contain information which is covered by professional or other privilege. If you are not the intended addressee, you must not disclose, forward, copy or take any action in reliance on this email or its attachments. If you have received this email in error, please notify the sender at data@retirement.capital as soon as possible and delete this email immediately and destroy any hard copies of it.

3 attachments



image**254770.**png 27K



image615406.png



image615406.png