
From: Jacqui Taylor <Jacqui.Taylor@brcaccountants.co.uk>
Sent: 24 April 2013 11:10
Subject: RE: Pension Scheme Return to HMRC & Questionnaire now due

Hi Carlo

The only transactions are the property being transferred to the fund. I am assuming that Pension Practitioner just need your confirmation of this and they will then complete the return – I think it would be unnecessary additional costs for you to get us to prepare a statement – but let me know if you, or Pension Practitioner, disagree and I will get one prepared.

With reference to the questionnaire, as far as I am aware the answer to the first 2 questions are yes, and the rest are no. You will then need to complete the member details with your 3 individual personal details as you will enter onto your personal tax returns.

Let me know if I can be of any further assistance or you need that statement preparing.

Good news about the contribution.

Kind regards

Jacqui

Jacqui Taylor
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From: Carlo [<mailto:carlo@longar.co.uk>]
Sent: 24 April 2013 09:27
To: Jacqui Taylor
Cc: Marcus Poole
Subject: FW: Pension Scheme Return to HMRC & Questionnaire now due

Hi Jacqui

I think we spoke about preparing a financial statement of affairs for the scheme each year. This should be a brief one page simple document, especially seeing as there are no transactions going through the pension. Please provide documentation and responses to questionnaire. I can then send back to the pension people.

Looks like they are going ahead with the second inspecie to include in our year end which is good news, I am just waiting on documentation from Mark.

Regards

Carlo

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From: Stacy Lunnon [<mailto:stacyl@pensionpractitioner.com>]

Sent: 19 April 2013 22:43

Subject: Pension Scheme Return to HMRC & Questionnaire now due

Dear Trustee,

The Pension Scheme Tax Return to HMRC for your Scheme fell due on the 05 April 2013 and we will prepare this return shortly on your behalf.

I am attaching a Pension Scheme Return Questionnaire which will assist us in the preparation and completion of the pension scheme return and members benefit statement. Please complete the questionnaire and return to us along with asset values as at 05 April 2013.

If your Scheme has 2 members or more, we require a financial statement of affairs in the form of pension scheme accounts for the return period 06 April 2012 to 05 April 2013.

Where you have not elected for the pension scheme year end to coincide with the tax year, the accounts year end will need to fall after 06 April 2012 and before 05 April 2013.

We require the questionnaire, data and/or pension scheme accounts by no later than 05th July 2013.

If you have any questions please do not hesitate to contact myself, or one of my colleagues at Pension Practitioner.Com.

Kind regards,

Stacy Lunnon

Pension Practitioner .Com

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