



Galina Williams <galina@retirement.capital>

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## Fwd: Portcullis Executive Pension Plan - tax return data

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

30 January 2025 at 10:49

Kind Regards  
Emily McAlister



Web: <https://retirement.capital>

Phone: 0330 311 0088

Email: [emily@retirement.capital](mailto:emily@retirement.capital)

Data Processing Centre  
Retirement.Capital  
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Merthyr Tydfil Industrial Business Park  
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CF48 4DR

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

From: **Phil Gooch** <[phil.gooch@portcullisinsurance.co.uk](mailto:phil.gooch@portcullisinsurance.co.uk)>

Date: Thu, 30 Jan 2025 at 10:28

Subject: RE: Portcullis Executive Pension Plan - tax return data

To: emily@retirement.capital <emily@retirement.capital>

Cc: Damon Ashton <[damon.ashton@portcullisinsurance.co.uk](mailto:damon.ashton@portcullisinsurance.co.uk)>

Hi Emily

Apologies again

The details are unchanged from last year so are as follows:-

- No transactions at present
- Values as at 05 April 2024
- Red Pear Sports & Entertainment Ltd Shares - £285,000
- Portcullis Lonsdale Ltd Shares - £521,000

Regards

**PHIL GOOCH | DIRECTOR**

Mobile: 07725 225361 Office Tel: **01622 600101** |

Email: [phil.gooch@portcullisinsurance.co.uk](mailto:phil.gooch@portcullisinsurance.co.uk) | Web: [www.portcullisinsurance.co.uk](http://www.portcullisinsurance.co.uk)

Broughton House, Offices, [31-33 Earl Street, Maidstone, Kent, ME14 1PF](#)



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**From:** Emily McAlister <[emily@retirement.capital](mailto:emily@retirement.capital)>

**Sent:** 28 January 2025 09:10

**To:** Phil Gooch <[phil.gooch@portcullisinsurance.co.uk](mailto:phil.gooch@portcullisinsurance.co.uk)>

**Cc:** [damon.ashton@portcullisinsurance.co.uk](mailto:damon.ashton@portcullisinsurance.co.uk); Soo Humphreys <[Soo.humphreys@portcullisinsurance.co.uk](mailto:Soo.humphreys@portcullisinsurance.co.uk)>

**Subject:** Re: Portcullis Executive Pension Plan - tax return data

Hi Phil,

I trust you are well.

I left a voice message for you on your mobile today, I hope that you received it. Will you please send me tax return data today as we need to file your return urgently before the HMRC deadline.

Bank statements covering 06.04.23 - 05.04.24

Shares (if changed) as at 05.04.24

Thank you.

Kind Regards

Emily McAlister



Web. <https://retirement.capital>

Phone: 0330 311 0088

Email: [emily@retirement.capital](mailto:emily@retirement.capital)

Data Processing Centre

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30.01.25, 10:50

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On Thu, 12 Dec 2024 at 12:50, Emily McAlister <[emily@retirement.capital](mailto:emily@retirement.capital)> wrote:

Dear Phil,

I hope you are well.

We need to prepare and submit your scheme tax return. Will you please send me:

Bank statements covering 06.04.23 - 05.04.24

Shares (if changed) as at 05.04.24

Thank you.

Kind Regards

Emily McAlister

**CHRISTMAS OPENING HOURS** 🎄

*Please note that our office will close on 20 December.*

*We will be open on weekdays between official Bank Holidays (i.e., 25-26 December and 1 January) to attend to payments, payroll and urgent requests. Normal business will resume on Thursday, 2 January.*

*Wishing you a very Merry Christmas!* 🎁 🎊



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