



Emily McAlister <emily@retirement.capital>

Priory Gate SSAS - new Aviva investment

3 messages

Simon Carlin <simon@thelostcoin.co.uk>

17 February 2022 at 15:52

To: "Emily McAlister (emily@retirement.capital)" <emily@retirement.capital>

Cc: "Dave Curran (dtc@newgateprojects.co.uk)" <dtc@newgateprojects.co.uk>

Hi Emily

After much toing and froing with Aviva they have now accepted Dave and Annette's investment application. This has actually worked in the clients' favour as markets have dropped since we first applied a month ago.

Please can you arrange for the sum of £550,000 to be paid to Aviva from Priory Gate SSAS AIB account quoting the following information:

Bank Account: Aviva Wrap UK Limited Client Money Collection

Sort-code: 40-02-50

Account number: 21357735

Reference: AV2647631-001

I appreciate that this may have to be sent in tranches depending on the daily limit with AIB Bank.

Many thanks

Regards,

Simon Carlin BA DipPFS DipPMI

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Simon Carlin <simon@thelostcoin.co.uk>

17 February 2022 at 16:05

To: "Emily McAlister (emily@retirement.capital)" <emily@retirement.capital>

Cc: "Dave Curran (dte@newgateprojects.co.uk)" <dte@newgateprojects.co.uk>

Further to my email below please see attached a copy of their confirmation schedule.

Regards,

Simon Carlin

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220217 Aviva confirmation schedule - Priory Gate.PDF
78K

Emily McAlister <emily@retirement.capital>

18 February 2022 at 08:55

To: Tony McCartney <tonym@retirement.capital>

Hi Tony,

Just forwarding this to cast your eyes over before I make this large payment out.. sure all ok but would rather you looked over first. It is a lot of money after all!

I will prepare an outward payment to be signed before any money is transferred of course.

Thanks
Emily

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

From: **Simon Carlin** <simon@thelostcoin.co.uk>

Date: Thu, 17 Feb 2022 at 16:52

Subject: Priory Gate SSAS - new Aviva investment

To: Emily McAlister (emily@retirement.capital) <emily@retirement.capital>

Cc: Dave Curran (dte@newgateprojects.co.uk) <dte@newgateprojects.co.uk>

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