



Emily McAlister <emily@retirement.capital>

Roberts PS

1 message

Tony McCartney <tonym@retirement.capital>
To: Emily McAlister <emily@retirement.capital>

19 May 2021 at 16:10

Initial fund value : £156,426.48
Comprised of
Nigel : £116,142.97 (74.248%)
Jane £40,283.51 (25.752%)

All subsequent bills, purchases, etc are split along these lines. There have been no further contributions, transfers, etc to affect these percentages, so they would just be applied to the latest figures:

Current fund value : £154,946.48; comprised of property (£150,000) & cash (£4,946.48)
Applying the split percentages to these figures, we get :

Nigel : £115,044.66 (property - £111,372; cash - £3, 672.66)
Jane : £39,901.82 (property - £38,628; cash - £1,273.82)

Cheers,

Tony

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Web. <https://retirement.capital>

Data Processing Centre
Retirement.Capital
Venture Wales Building
Merthyr Tydfyl Industrial Business Park
Merthyr Tydfyl
Wales
CF48 4DR

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