

Our ref: KH/MMC/2619



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2<sup>nd</sup> December 2011

Dear Brad

**Re: The Springfield Pension Scheme - Mr John Coldrick & Mrs Margaret Coldrick**

Further to our recent email correspondence please find enclosed Benefit Crystallisation Event Member Questionnaires for both members in order for them to take maximum tax free cash from the scheme.

I also enclose a copy statement confirming the cash balance of the external Scottish Widows cash account, I have asked for Mr Coldrick to organise the return of these fund back to the scheme's Bank of Scotland bank account.

I also enclose a property valuation report from 21<sup>st</sup> March 2011 which you confirmed as acceptable.

Finally please be aware that the Bank of Scotland account should have recently received the quarterly rental income taking the balance to approximately £19,443.

Based on the above figures the scheme is worth c.£562,824 of which £142,824 is held as cash. The cash balance therefore meets the tax free cash payments of c.£140,706.

I would be grateful if you could start to process the enclosed forms and inform me of when you already to make the tax free cash payment to the clients.

Should you have any queries please do not hesitate in contacting me.

Yours sincerely

Matthew Clapton  
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Offices also in **Bristol**

**FINANCIAL PLANNING & ASSET MANAGEMENT**

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