



Galina Williams <galina@retirement.capital>

Fwd: Taipan Retirement Benefits Scheme - Tax Return Data Request

Emily McAlister <emily@retirement.capital>

22 November 2021 at 14:32

To: Galina Williams <galina@retirement.capital>, Veronica Walkman <veronica@retirement.capital>

Cc: Vikki Whitby <vikki@retirement.capital>

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

From: info@tonycarson.com <info@tonycarson.com>

Date: Mon, 22 Nov 2021 at 13:26

Subject: Taipan Retirement Benefits Scheme - Tax Return Data Request

To: Retirement Capital -ex-Pension Practitioners <emily@retirement.capital>

Hi Vikki,

Sorry I missed Emily's 'summer' email request!

I can confirm that the only transaction in the year to 5/4/21 was the £25k purchase of shares in Automated Intelligence Ltd in June 2020 - which can be seen in the Bank Statement and Emily's correspondence.

All asset values are as per the previous year.

No movements of any sorts recorded.

Latest Artemis valuation has already been scanned and sent to Emily.

Regards

Tony

info@tonycarson.com

07711190933

On 18 Nov 2021, at 13:42, Emily McAlister <emily@retirement.capital> wrote:

Hello Tony,

I hope all is well with you.

Following on from Emily's email below please can you provide the information required for your Scheme Tax Return:-

Can you please provide me with the following information so we can prepare and submit your scheme tax return:

1. Detailed transaction history on the pension scheme bank account (**we have your AIB statements**)
2. Asset values as at 05 April 2021, i.e. investments, property, shares, loans
3. Details of any assets purchased or disposed of during the period

Any other information you feel may be beneficial and also if possible a brief email outlining any movements within the scheme during the period and any other documentation, statements or other attachments that you feel would be relevant.

I look forward to hearing from you.

Thank you.

Vikki Whitby on behalf of Emily McAlister

On Wed, 2 Jun 2021 at 14:28, Emily McAlister <emily@retirement.capital> wrote:

Dear Tony,

Can you please provide me with the following information so we can prepare and submit your scheme tax return:

1. Detailed transaction history on the pension scheme bank account (**we have your AIB statements**)
2. Asset values as at 05 April 2021, i.e. investments, property, shares, loans
3. Details of any assets purchased or disposed of during the period

Any other information you feel may be beneficial and also if possible a brief email outlining any movements within the scheme during the period and any other documentation, statements or other attachments that you feel would be relevant.

I look forward to hearing from you.

Thank you.

Kind Regards
Emily

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Phone: 0330 311 0088
Email: emily@retirement.capital

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