



Emily McAlister <emily@retirement.capital>

Tempatron Directors Pension Scheme - Tax Return Data Request

3 messages

Emily McAlister <emily@retirement.capital>
To: Peter Neudegg <peter@goodburn.net>

1 June 2021 at 13:01

Dear Trustees,

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

Vikki Whitby (on behalf of Emily McAlister)

Retirement
.Capital



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Peter Neudegg <Peter@goodburn.net>
To: Emily McAlister <emily@retirement.capital>

7 June 2021 at 10:39

Emily,

Pension statement attached

The only major change this year was the drawdown to Brian McVitty of £32005.

Let me know if there are any questions.

Regards

Peter

From: Emily McAlister <emily@retirement.capital>
Sent: 01 June 2021 12:02
To: Peter Neudegg <Peter@goodburn.net>
Subject: Tempatron Directors Pension Scheme - Tax Return Data Request

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Thank you.

Kind Regards

Vikki Whitby (on behalf of Emily McAlister)



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Statement2021.pdf

550K

Emily McAlister <emily@retirement.capital>

7 June 2021 at 12:09

To: Peter Neudegg <Peter@goodburn.net>

Hi Peter,

Thank you for your email and the information provided.

Kind regards

Emily

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