



gavin mccloskey <gavinm@retirement.capital>

FEES

3 messages

Simon Madin <sdmelectrics@live.co.uk>
To: gavin mccloskey <gavinm@retirement.capital>

Sun, Feb 14, 2021 at 4:20 PM

Hi Gavin ,
Hope the passports are ok let me know if there is anything else you need. Do you need a photo in addition to these?
Also can you tell me what our fees are going to be? At present we have an invoice on a quatley bases from rowanmoor and operate with a cheque book requiring 2 signatures . How will this work with you. My Mum will be returning signed paperwork Tuesday.

Regards

Simon Madin

gavin mccloskey <gavinm@retirement.capital>
To: Simon Madin <sdmelectrics@live.co.uk>

Thu, Feb 18, 2021 at 1:26 PM

Hi Simon,
Tks for the ID - this has been sent to the admin team who will set up the accounts for each of you. My thought process was to cost the pension scheme as a two person arrangement, as unless your brother is going to start actively contributing or participating, a two person scheme would be more effective for you. Under this arrangement, the cost for scheme administration and compliance would be £1350 p.a. In the first year this is collected annually in advance, thereafter it can be paid quarterly by direct debit from the trustee account.
Please let me know if this fits in with your requirements

tks

gavin

[Quoted text hidden]

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Simon Madin <sdmelectrics@live.co.uk>
To: gavin mccloskey <gavinm@retirement.capital>

Tue, Feb 23, 2021 at 8:41 PM

Will pop signed paperwork in the post tomorrow.