

Cranfords

Department -				Payment Method - BACS		Payment Period - Monthly	
Pension Income	1.00	4000.0000	4000.00	PAYE Tax	800.00	Total Gross Pay TD	4000.00
				National Insurance	0.00	Gross for Tax TD	4000.00
						Tax paid TD	800.00
						Earnings For NI TD	0.00
						National Insurance TD	0.00
						Earnings for NI	0.00
						Gross for Tax	4000.00
						Total Gross Pay	4000.00
						Nat. Insurance No	YY911879C
9	13/12/2016		BR	15	Mr. G Brooks		3200.00

Account Holder Details

Previous

Locate

Next

Account Holder Details		Accounts	Related
Account Holder Reference	000064000GLENNBROOKS		Bank Balance
Account Holder Name	The GBC Pension Scheme		Ledger Balance
Account Number	VIR11223320009648		Forward Balance
Account Type	CLG - Client G		Available Balance
Account Currency	GBP - Sterling		Balance Brought Forward
			26,053.26
			26,053.26
			26,053.26
			26,053.26
			38,221.42

Transactions	Forward	Statements	Interest			
1 to 3 of 3						
Settled Date	Transaction Date	Transaction Reference	Description	Debit	Credit	Running Balance
05/12/2016	05/12/2016	000168272A1	LOAN REPAYMENT	7,498.16		26,053.26
01/12/2016	01/12/2016	000167836A1	Ann Admin & Prop Admin Fee	855.00		33,551.42
01/12/2016	30/11/2016	000167677A1	Martin Sir Invoice	3,815.00		34,406.42

£26,053.26 - balance

- £4,000 Gross income (£3,200 income / £800 PAYE)
- £750 Sequence fee.
- £90 Payroll fee. invoice 1457.

£21,213.26 remaining.

= £5 months of just income remaining.


 13/12/16

Protection

This section only applies where you have registered with HM Revenue & Customs for protection, or have a protected pension age (for example you are able to commence benefits before age 55).

Have you registered for any type of protection?

Yes / No

If yes please provide a copy of your certificate

Do you have a protected pension age?

Yes / No

If yes, please confirm the protected pension age:

Lifetime Allowance

If you have registered for transitional of fixed protection and have crystallised benefits with another provider, please complete the information below. We will also require a copy of your protection certificate.

Date benefits crystallised

Value at crystallisation

If you have already used your full lifetime allowance and want to take further benefits tax charges will apply. Please confirm if:

A. The value of your benefits above the lifetime allowance should be paid as a lump sum, subject to 55% tax

☐

OR

B. Retained in your SSAS, designated to drawdown and subject to a 25% tax charge

☐

OR

C. Not Applicable

☐

Income Payments

Please confirm the amount of income you require (one only), the frequency of payments and whether this is payable in advance or arrears.

Amount:-	Nil	<input type="checkbox"/>	Maximum	<input type="checkbox"/>	Specified Amount (£)	<input type="text" value="4000"/>
Frequency:-	Monthly	<input checked="" type="checkbox"/>	Quarterly	<input type="checkbox"/>	Annually	<input type="checkbox"/>
Timing:-	Advance	<input type="checkbox"/>	Arrears	<input type="checkbox"/>		

Payment Details

In order for your benefits to be paid, please provide your bank details below:

Bank Name:	<input type="text" value="SANTANDER"/>		
Bank Address:	<input type="text" value="ABINGDON"/>		
Account Name:	<input type="text" value="MR S REOOLS"/>		
Account Number:	<input type="text" value="87761123"/>	Sort Code:	<input type="text" value="09-01-28"/>

HMRC – PAYE Payment details

Once Kath has given you a payslip make payment to ...

HMRC

08-32-10

12001039

Ref: **120PS00791908** (This reference must be included on payments or HMRC won't be able to allocate it!)

Sequence Financial Management Limited
14 Brunel Court
Rudheath Way, Gadbrook Park
Northwich
CW9 7LP
Tel : 0345 643 2633



GBC Pension Scheme
C/O Cranfords
1 The Pavilions
Cranford Drive
Knutsford
Cheshire
WA16 8ZR

Invoice No	IOF02260886
Invoice Date	12th December 2016
Client Name	Glenn Brooks
Adviser	Robert Colin

Description	Unit Price	Net Amount	VAT %	VAT
Advice & implementation of benefit crystallisation events	£750.00	£750.00	0.00	0.00

Please arrange for payment to be made by cheque or bank transfer strictly within 30 days.
Sequence Financial Management
National Westminster Bank PLC
Account Number: 32280068
Sort Code: 60-12-30

Total Net Amount	£750.00
Total VAT Amount	£0.00
Invoice Total	£750.00