



Stacy Lunnon <stacyl@pensionpractitioner.com>

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## request for data letter to Brown Shipley - Wisdom Pension Fund

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**Stacy Lunnon** <stacyl@pensionpractitioner.com>

4 May 2017 at 16:50

To: GSI <financialservices@gsigroup.co.uk>

Cc: "tonym@pensionpractitioner.com" <tonym@pensionpractitioner.com>

Hi Sarah,

We will need to amend the 2016 tax return to HMRC based on this new information and I will let you know if we require anything further.

Can you confirm you are happy with the following details for the 2017 tax return and then we can provide the fund split based on this:

Pru Policies £443,541

Property Valuation £550,000

Cash at bank £969

Rental income received 6/4/16 to 5/4/17 £40,000

Amount invested to Pru for the period 6/4/16 to 5/4/17 £80,000

Total asset valuation as at 05 April 2017: £994,510

When was the property last valued formally? If the Trustees wish to have an updated valuation then the split of funds and any tax free cash available would be more accurate.

Kind regards,  
Stacy Lunnon

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