



Esther S &lt;esther@pensionpractitioner.com&gt;

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**Kim Wisdom**

1 message

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**Sarah Cope** <SarahCope@gsigroup.co.uk>  
To: Esther S <esther@pensionpractitioner.com>  
Cc: Stacy Lunnon <stacyl@pensionpractitioner.com>

21 June 2018 at 13:54

Hi Esther,

Thanks for all your help yesterday.

Dan has spoken to the client and agreed the following with her,

- Going forward please could her monthly income be a total of £729 but split into two payments, one for £229 and another for £500.
- Please could we make two adhoc payments of £500 each to go to the client ASAP?
- Please could both Nick and Kim Wisdom have a statements of all payments made to them for tax year 17/18.
- Are we able to look into what happened with Kim's Tax free cash payment ?, we briefly touched on this In our email attached but looking back now I can't see that I received the outward payment form for the client to sign or the statement to say how much it would be ? (this part is rather urgent).

I look forward to hearing from you.

Kind regards

Sarah Cope

Client Relationship Manager

*A referral remains the highest compliment we can receive. If you know of family or friends who could benefit from our tailored financial advice we would be grateful for the introduction.*



***Because your family matters***

1 Churchill Court , Horton's Way, Westerham,  
Kent ,TN16 1BT

Tel: 01959 561500

Fax: 01959562570

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

From: Sarah Cope <SarahCope@gsigroup.co.uk>  
To: Esther S <esther@pensionpractitioner.com>  
Cc: Stacy Lunnon <stacyl@pensionpractitioner.com>  
Bcc:  
Date: Tue, 15 May 2018 12:01:47 +0000  
Subject: RE: The Wisdom Pension Fund - AIB

Hi Esther,

I have some of the below information as requested but a couple of things I have to check with Dan on so it come back to you if that's ok.

- C296T638 – £41,695.59
- C277T744 - £43,012.69
- B992E720 - £250,137.05
- C116P426 – this is the investment we just cashed in and was transferred to the AIB scheme bank account, confirmation attached as requested
- C131M801 - £47,126.88
- C173B327 - £56,578.54
- C231M797 - £44,618.39
- 

I'll come back to you shortly on the others.

Thanks so much for all your help, I really appreciate it.

Kind regards

Sarah Cope

Client Relationship Manager

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**From:** Esther S [mailto:[esther@pensionpractitioner.com](mailto:esther@pensionpractitioner.com)]  
**Sent:** 15 May 2018 12:01  
**To:** Sarah Cope <[SarahCope@gsigroup.co.uk](mailto:SarahCope@gsigroup.co.uk)>  
**Cc:** Stacy Lunnon <[stacyl@pensionpractitioner.com](mailto:stacyl@pensionpractitioner.com)>  
**Subject:** Re: The Wisdom Pension Fund - AIB

Hi Sarah,

Many thanks for your email.

I can provide you with an up to date value of the AIB scheme bank account. The value as of today is £33,231.28. Please may you confirm that AIB bank account is the only cash asset within the pension scheme, thank you.

All other scheme asset values have previously been provided by GSI, including Prudential Tip's and property value. We do have a list of Prudential Plan Numbers:

C296T638

C277T744

B992E720

C116P426

C131M801

C173B327

C231M797

I would be very grateful if GSI may provide us with the up to date values, so we may then calculate Kim's 25% tax free cash. Once we have calculated Kim's TFC, we will provide you with a statement and an outward payment form to be signed.

With regards to Kim's income, I must apologise. The first payment of £229.00 was not processed. I will ensure that the standing order to set up correctly in time for Kim's income on the 20th of this month. Would you like the first payment to be £714.00 or include the £214.00 as well for April? I am sorry about that.

On the subject of income, we will produce a Trustee Resolution detailing the monthly income payments are paid gross to Nick and Kim.

Please may I trouble you to confirm the details of the Prudential funds of £30,371.54 that was received into the AIB scheme bank account yesterday, whether it was an encashment of the investment, or is it a transfer in on behalf of a member? Have Prudential supplied a written confirmation of the transfer of funds, if so, please may I trouble you for a copy, thank you.

Lastly, St. James's Place have written to us asking for information of the pension scheme and have a letter of authority. I will send you a copy.

Thank you again for your help and I look forward to hearing from you.

Kind Regards

Esther Salmon  
Administrator

Please note that from 1st September 2017 our address has changed to:

Pension Practitioner  
48 Chorley New Road  
Bolton  
BL1 4AP

T: 0800 634 4862

F: 020 8711 2522

Pension Practitioner is a tradestyle of The Practitioners Partnership LP

Registered Number: 00159

Registered Office: 1st Floor, World Trade Centre, Baytree Road, Gibraltar GX11 1AA

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On 14 May 2018 at 15:51, Sarah Cope <[SarahCope@gsigroup.co.uk](mailto:SarahCope@gsigroup.co.uk)> wrote:

Hi Esther,

Thank you for the below confirmation.

The adviser Dan has asked the following, is this something you can help me with or point me in the right direction.

- Are you able to revalue the scheme assets, including Bank, Pru Tip's and Property (existing value)
- Arrange to pay Kim Wisdom her 25% TFC
- Can we arrange to increase Kim's income to £714.00pm I believe its currently set at £214

Kind regards

Sarah Cope

Client Relationship Manager

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,TN16 1BT



**From:** Esther S [mailto:[esther@pensionpractitioner.com](mailto:esther@pensionpractitioner.com)]  
**Sent:** 14 May 2018 13:41  
**To:** Sarah Cope <[SarahCope@gsigroup.co.uk](mailto:SarahCope@gsigroup.co.uk)>  
**Subject:** Re: The Wisdom Pension Fund - AIB

Dear Sarah,

I can confirm that £30,371.54 has arrived in The Wisdom AIB pension scheme account.

Many thanks

Kind Regards

Esther Salmon  
Administrator

Please note that from 1st September 2017 our address has changed to:

Pension Practitioner  
[48 Chorley New Road](#)  
[Bolton](#)  
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On 18 April 2018 at 16:16, Sarah Cope <[SarahCope@gsigroup.co.uk](mailto:SarahCope@gsigroup.co.uk)> wrote:

Thanks Esther

Kind regards

Sarah Cope

Client Relationship Manager

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**From:** Esther S [mailto:[esther@pensionpractitioner.com](mailto:esther@pensionpractitioner.com)]  
**Sent:** 18 April 2018 14:36  
**To:** Sarah Cope <[SarahCope@gsigroup.co.uk](mailto:SarahCope@gsigroup.co.uk)>  
**Subject:** The Wisdom Pension Fund - AIB

Dear Sarah,

Thanks for your call just now.

The AIB address is:

Allied Irish Bank  
St. James' House  
Charlotte Street  
Lancashire  
M1 4DZ

I will let you know as soon as the £30,000 has arrived.

Thanks again.

Kind Regards

Esther Salmon  
Administrator

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## 2 attachments



**Wisdom Pru encashment.pdf**

300K



**noname.eml**

524K