



Stacy Lunnon <stacyl@pensionpractitioner.com>

PENSION FUND ACCOUNTS

4 messages

Geoff Turner <geoff@werrington.me.uk>
To: Stacy Lunnon <stacyl@pensionpractitioner.com>

5 December 2016 at 20:36

Stacy

I am attaching the following documents as requested;

Statement of affairs for the year ended 5th April 2016.

Loan Agreement.

Standard Life Transfer Certificate.

Invoice for sale of land and purchase of industrial building.

Sorry about the delay

All the best

Geoff Turner

2 attachments



PENSION FUND DOCUMENTS 2016.pdf
1723K



PENSION STATEMENT OF AFFAIRS 2016.xls
29K

Stacy Lunnon <stacyl@pensionpractitioner.com>
To: Geoff Turner <geoff@werrington.me.uk>

7 December 2016 at 15:22

Hi Geoff,

Thank you for the data.

Can we please have a copy of the land registry title deed of 3 Papyrus Road in the new name of the Trustees of the Turner Enterprises Ltd Retirement Benefit Plan, the completion statement for the sale of Land at School Lane Runcion and confirmation of the legal charge over the property secured for the loan of £120,000 for our file.

Can you also confirm you are in agreement with the following to be recorded in the 2016 pension scheme tax return to HMRC:

Connected Land/Property -
Unit 2 Papyrus MV £275,000 rental income £14,400
Unit 3 Papyrus MV £185,000 (acquired) rental income £600

Land at North Runcion (disposed of) £205,000

Un-connected Land/Property -

Land in Yaxley MV £45,000 rental income £2,400

Unit 1 Papyrus MV £280,000 rental income £22,800

Stockwell Works MV £250,000 rental income £15,000

Connected party loan £120,000

Cash at Bank £160,680

Kind regards,
Stacy Lunnon

Pension Practitioner .Com
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NW7 4SD

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HMRC Practitioner Reg: 00005886

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Geoff Turner <geoff@werrington.me.uk>
To: Stacy Lunnon <stacyl@pensionpractitioner.com>

9 December 2016 at 16:45

Stacy

I attach the completion statement for the land sale and also legal charge documentation regarding the loan.

I don't have the land registry title deed to hand for unit 3 Papyrus road and I have asked my solicitor for a copy.

See below my comments regarding rental income.

Best wishes

Geoff Turner

From: Stacy Lunnon [<mailto:stacyl@pensionpractitioner.com>]

Sent: 07 December 2016 14:23

To: Geoff Turner <geoff@werrington.me.uk>

Subject: Re: PENSION FUND ACCOUNTS

Hi Geoff,

Thank you for the data.

Can we please have a copy of the land registry title deed of 3 Papyrus Road in the new name of the Trustees of the Turner Enterprises Ltd Retirement Benefit Plan, the completion statement for the sale of Land at School Lane Runcton and confirmation of the legal charge over the property secured for the loan of £120,000 for our file.

Can you also confirm you are in agreement with the following to be recorded in the 2016 pension scheme tax return to HMRC:

Connected Land/Property -

Unit 2 Papyrus MV £275,000 rental income £14,400 **correct**

Unit 3 Papyrus MV £185,000 (acquired) rental income £600 **Rental income was £3,600.**

Land at North Runcton (disposed of) £205,000 **correct**

Un-connected Land/Property -

Land in Yaxley MV £45,000 rental income £2,400 **No rental income this year.**

Unit 1 Papyrus MV £280,000 rental income £22,800 **Correct**

Stockwell Works MV £250,000 rental income £15,000 **Correct**

Connected party loan £120,000 **Correct**

Cash at Bank £160,680 **Correct**

Kind regards,

Stacy Lunnon

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On 5 December 2016 at 20:36, Geoff Turner <geoff@werrington.me.uk> wrote:

Stacy

I am attaching the following documents as requested;

Statement of affairs for the year ended 5th April 2016.

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Standard Life Transfer Certificate.

Invoice for sale of land and purchase of industrial building.

Sorry about the delay

All the best

Geoff Turner

3 attachments



COMPLETION STATEMENT RUNCTON LAND TO TE.pdf
243K



TITLE CEDAR DRIVE RE PENSION LOAN.pdf
1382K



PENSION LOAN LEGAL CHARGE.pdf
12623K

Stacy Lunnon <stacyl@pensionpractitioner.com>
To: Geoff Turner <geoff@werrington.me.uk>

12 December 2016 at 13:50

Hi Geoff,

Thank you, when you have a copy of the Land Reg title deed to hand we would appreciate it for our file. In the meantime, I am pleased to confirm that the 2016 pension scheme tax return has now been submitted to HMRC. Attached is the submission receipt for your records.

Kind regards,
Stacy Lunnon

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HMRC submission receipt tax return april 2016.pdf

83K