



Stacy Lunnon <stacyl@pensionpractitioner.com>

Universal Group EPF - Simon Best - Pension Sharing Order

Melissa Roach <mroach@5gcomms.com>

31 May 2018 at 11:15

To: Stacy Lunnon <stacyl@pensionpractitioner.com>

Cc: Marta DeGouveia <MartaDeGouveia@mdgifa.com>, David Coates <dcoates@5gcomms.com>, Esther S <esther@pensionpractitioner.com>

Hi Stacy,

Further to my email last night, please find below the additional information I believe you require regarding pension contributions and drawdowns:

1. Pension split for the year is as per the table below

Members 2017/18		Per Month Employee Per Month Company		Total Contribution Employee and Company per month
Michael	Holland	0.00	1250.00	1250.00
Susan	Holland	145.83	145.83	291.66
Phillip	Holland	258.33	258.33	516.66
David	Coates	270.83	270.83	541.66
Simon	Best	175.00	175.00	350.00
Graham	Gerred	187.50	187.50	375.00
Allan	Bedford	0.00	0.00	0.00
Kim	Lombard	291.67	291.67	583.34
Melissa	Holland	291.67	291.67	583.34

Plus we banked the transfers from you and Kim on 23/08/2018 for £39,337.87 and £38,206.17 but not sure which amount goes with who

2. Allan Bedford took 4 x payments of £2,000.00 = £8000.00 in Total in the year

3. No new valuations have been done in the year and are the same as last year as below .
The main one Park House was done in 2016

Property	Valuer	Date	Amount
Park House, High Wycombe	Kempton Carr Croft	17/05/2016	£750,000
1/3 St James Road Forfar	Shepherd Commercial	19/04/2013	£95,000
Unit 13 Regents Trade Park Gosport	Kempton Carr Croft	12/03/2013	£125,000
		Total	£970,000

4. I attach the Valuation of the Fidelity Funds as per Mark on 31/03/2018

Please can you let me know whether you need any further information in order to complete the statements?

Kind regards

Melissa

Melissa Roach

Operations Manager
5G Communications

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From: Melissa Roach

Sent: 30 May 2018 19:03

To: 'Stacy Lunnnon' <stacyl@pensionpractitioner.com>

Cc: Marta DeGouveia <MartaDeGouveia@mdgifa.com>; David Coates <dcoates@5gcomms.com>;
Esther S <esther@pensionpractitioner.com>

Subject: RE: Universal Group EPF - Simon Best - Pension Sharing Order

Hi Stacy,

We have received the accounts from Ward Williams (see attached). Unfortunately, Michael is now away until Monday 11th June therefore we will not be able to send a signed copy until after that date (since the Accountants will not counter-sign these until Michael has signed these).

In the meantime, David will collate and provide details of the contributions and drawdowns over the last financial year in order that you can prepare the draft statements although I expect you will need to see the signed accounts before you can issue the approved versions.

Hopefully, we will also receive the Decree Absolute shortly so we can finalise this matter once the accounts are signed.

Kind regards

Melissa

Melissa Roach

Operations Manager
5G Communications

Tel. 01494835462 Out Of Hours. 01494 833833

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From: Stacy Lunnon <stacyl@pensionpractitioner.com>

Sent: 30 May 2018 11:14

To: Melissa Roach <mroach@5gcomms.com>

Cc: Marta DeGouveia <MartaDeGouveia@mdgifa.com>; David Coates <dcoates@5gcomms.com>; Esther S <esther@pensionpractitioner.com>

Subject: Re: Universal Group EPF - Simon Best - Pension Sharing Order

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Fidelity Historic Valuation-10-05-2018.docx

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