



Emily McAlister <emilym@pensionpractitioner.com>

Verity and Beverley Limited Pension Scheme

3 messages

Emily McAlister <emilym@pensionpractitioner.com>

10 December 2020 at 16:26

To: Nathan Elphick <info@verity-beverley.co.uk>

Dear Nathan,

I hope that you and your family are well.

Can you please send me the following information please:

1. Detailed transaction history on the pension scheme bank account (**we have your AIB statements**)
2. Asset values as at 05 April 2020, i.e. investments, property, shares, loans
3. Details of any assets purchased or disposed of during the period

Any other information you feel may be beneficial and if possible a brief email outlining any movements within the scheme during the period and any other documentation, statements or other attachments that you feel would be relevant.

I look forward to hearing from you.

--

Kind Regards

Emily McAlister
Administrator*Please note our new administration and post processing centre:*

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Nathan Elphick <info@verity-beverley.co.uk>

10 December 2020 at 18:23

To: Emily McAlister <emilym@pensionpractitioner.com>

Dear Emily,

Thank you for your email.

1. I trust that you have everything that you need in this respect (AIB Statements)
2. The Building (the Asset) was last valued in November 2014 at £350,000.00 and there is an outstanding loan balance of £43,052.81
3. There have been no asset purchases or disposals

Kind regards,

Nathan

Nathan Elphick

Director

Verity & Beverley Ltd

Architects . Designers

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www.verity-beverley.co.uk

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Emily McAlister <emilym@pensionpractitioner.com>
To: Nathan Elphick <info@verity-beverley.co.uk>

11 December 2020 at 14:23

Thanks Nathan.

If I don't speak to you before, have a lovely Christmas.

Take care,
Emily

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