



Gavin M <gavinm@pensionpractitioner.com>

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## Pension Scheme

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Gavin <gavinm@pensionpractitioner.com>

11 February 2020 at 18:01

To: "mtozer@vortexdesigns.co.uk" <mtozer@vortexdesigns.co.uk>

Cc: David Bilantz <david.bilantz@sjpp.co.uk>

Hi Mike,

I have completed the paperwork for the pension scheme at my end and enclose the following.

1. A lifetime allowance certificate as required by HMRC.
2. A BCE form for your signing - this records the lump sum payment to you of £450,000.
3. A trustees resolution which formalises the payment of the lump sum of £450,000 represented by a share of the property and a property purchase of £175,000. The Company will now need to pay this cash into the trustees pension scheme bank account, for the consideration.

If you could sign (with Hannah) the Resolution, date and return this to me. I will complete the relevant event reporting with HMRC and please also return the signed BCE form to me. A scanned copy of both items is fine.

This will then conclude the transaction, and I will reflect the disposals and payments in the tax returns for the period to 5 April 2020, when it falls due next. I will need to raise an invoice for this work and this will be sent separately once I have filed the event reports.

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### 3 attachments



**vortex resolution.pdf**

75K



**LTA CERTIFICATE.pdf**

96K



**Benefit Crystallisation Event.pdf**

98K