

Georgina Stuliglowa <georginas@pensionpractitioner.com>

RE: Welch Investments Pension Scheme - Final PCLS payment & Drawdown Instruction

Robert Holmes <robert@carltonjames.co.uk>

7 February 2020 at 17:53

To: Georgina Stuliglowa <georginas@pensionpractitioner.com>

Cc: David Nicklin davidn@pensionpractitioner.com, Adam Holmes <a dam@carltonjames.co.uk>

Hi Georgina

Simon Welch, trustee member of the Welch Investments Pension Scheme has requested the final £6,000.00 PCLS. He has already taken £244,000.00 up to November 2019, with his pot valued at over £1,000,000 pre PCLS no further PCLS is available for future draws. In addition Simon wishes now to begin income drawdown on his fund as per the attached member benefit form at an amount of £6,000 gross pcm starting this month,

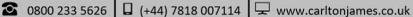
Any questions please let me know,

Kind Regards

Robert Holmes

Director

Carlton James



Lime Kiln House, Lime Kiln, Royal Wootton Bassett, SN4 7HF





Disclaimer

This email is sent in confidence for the addressee only. Unauthorised recipients must preserve this confidentiality and should please advise the sender immediately by returning the original email to us without reading it, taking a copy or disclosing it to anyone else. Please also delete the email from your computer. We have taken all reasonable precautions to ensure that no viruses are transmitted to any third party. No member of Carlton James Private & Commercial Ltd accepts any responsibility for any loss or damage resulting directly or indirectly from the use of this email or its contents

Carlton James Private & Commercial Ltd, Req. Office: Lime kiln House, Lime Kiln, Royal Wootton Bassett, SN4 7HF

Company Registration Number: 09074495

From: Robert Holmes <robert@carltonjames.co.uk>

10/02/2020, 13:36

Sent: 08 November 2019 13:45

To: 'Georgina Stuliglowa' <georginas@pensionpractitioner.com>

Cc: 'David Nicklin' <davidn@pensionpractitioner.com>; 'Adam Holmes' <adam@carltonjames.co.uk>

Subject: Welch Investments Pension Scheme - PCLS payment

Hi Georgina

Simon Welch, trustee member of the Welch Investments Pension Scheme has requested a further £24,000.00 PCLS. He has already taken £220,000.00 up to September this year, with his pot valued at over £1,000,000 pre PCLS it would leave a further £6,000 available for future draws.

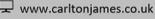
Any questions please let me know,

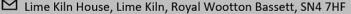
Kind Regards

Robert Holmes

Director

Carlton James









Disclaimer

This email is sent in confidence for the addressee only. Unauthorised recipients must preserve this confidentiality and should please advise the sender immediately by returning the original email to us without reading it, taking a copy or disclosing it to anyone else. Please also delete the email from your computer. We have taken all reasonable precautions to ensure that no viruses are transmitted to any third party. No member of Carlton James Private & Commercial Ltd accepts any responsibility for any loss or damage resulting directly or indirectly from the use of this email or its contents

Carlton James Private & Commercial Ltd, Reg. Office: Lime kiln House, Lime Kiln, Royal Wootton Bassett, SN4 7HF

Company Registration Number: 09074495

3 attachments

S Welch - Benefit Form 6-signed.pdf 1197K

S Welch Tax Code & Allowance.pdf 187K

2 of 3 10/02/2020, 13:36

3 of 3