



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 <adam@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

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



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

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

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3 attachments

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

 **S Welch Tax Code & Allowance.pdf**
187K



S Welch PCLS Payment.pdf

223K