From: Brad Davis [mailto:bradd@pensionpractitioner.com]

Sent: 21 March 2017 10:13

To: Andy Whitemore <Andy@avalon-guns.com>

Cc: David Nicklin <davidn@pensionpractitioner.com>; Jolyon Stonehouse <Jolyon.Stonehouse@oldmillgroup.co.uk>; Rod Podger (Rod@ulco.com) <Rod@ulco.com>

Subject: Re: 25% Tax free lifetime allowance

 Morning Andy,

The funds that have come in to the Metro Bank Account are as follows:-

09 December 2016 - £7,926.22. Please confirm what this payment is and whether it should be allocated to you? YES this was the last of the SIPP money from James Hay and it should be allocated to me.

03 March 2017 - £400,000 Funds for Commercial property acquisition

08 March - £8,000 Top up from SSAS investment for stamp duty etc on commercial acquisition.

09 March - £150,000 Funds for commercial loan

17 March - £210,000 (£170,000 allocated to you) £170k unused pension contribution for me and £40k for Joanne

09 April - £40,000 my pension contribution for next tax year

£190,924.34 LGT Vestra SSAS investment All my fund

This makes a total fund value for you of £958,924.34 (excluding the £7,926.22) or £966,850.56 (including the £7,926.22) All this seems OK and the figure as of 09/04/17 is £966,850.56 plus any rental income on 01/03/17 this should be £1250.00 from SVS and £833.33 from premier carwash total £2083.33 making my fund grand total £968,933.89 which we need to ratify on the drawdown day

If you are looking only to take your tax free cash at this stage then it is Section 3 of page 1 of the BCE Form that needs to be completed and signed.