**XYZ-Category B (Letter)**

Address to the Trustees of the XYZ scheme

Date

Dear Sir or Madam – **Category B – Tao Yang (**deceased)

Date of death 29 August 2021

Further to notification that the above named member has died, details of the benefits payable are set out below.

1. Lump sum death benefit

* As the member was still in service when she died after normal pension date, there is a lump sum death benefit (LSDB) payable of £22,635.60, being the five years’ pension payments due.
* The LSDB is payable to persons at the Trustees’ discretion.
* The LSDB represents 2.10% of the deceased member’s Lifetime Allowance.

2. Spouse’s pension payable

* A spouse’s pension is payable of £2,263.56 per annum.
* The spouse’s pension has been calculated to include the deceased member’s periods of part-time service from 16th June 1998 to 30th July 2011, inclusive.

3. Payment of pension

* + The spouse’s pension is payable monthly in advance.
  + The pension will start on 1st September 2021.

1. Pension increases

* The pension in payment will be increased each year on 1st April by the increase in the retail prices index or 5% if less.

1. Details required

Before the spouse’s pension can be put into payment, the following will be required:

* The member’s original death certificate.
* The spouse’s original birth certificate.
* The member and spouse’s original marriage certificate.
* The enclosed bank details form of the dependant.

If you have any queries, please contact me.

Yours faithfully,

A N Other

**NOTE** –

**Letters should be written in full** **and should include all of the information contained in each of the bullet points.**

**Failure to write a letter in full will result in marks being lost.**

**Failure to mention the information contained in each of the bullet points will result in marks being lost.**