**XYZ-Category B (Letter)**

Address to the Trustees of the XYZ scheme

Date

Dear Sir or Madam – **Category B – Ying Tauh (**deceased)

Date of death: 2nd September 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

* A lump sum death benefit (LSDB) of £37,819.06 is payable, being the balance the remaining pension payments capped to the member’s 75th birthday.
* The LSDB is payable to persons at the Trustees’ discretion.
* The LSDB represents 3.52% of the deceased member’s Lifetime Allowance.

2. Spouses pension

* A spouse’s pension is payable of £18,153.15 per annum.
* This allows for the augmentation of the spouse’s pension to 66.67% of the deceased member’s pension.

3. Payment of pension

* + The spouses pension is payable monthly in advance.
  + The pension will start on 1st October 2021.
  + The pension will be paid for life and will be subject to PAYE.

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 member and spouse’s original marriage certificate.
* The spouse’s original birth certificate.
* The enclosed bank details form completed by the spouse.

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.**