**XYZ-Category B (Letter)**

Address to the Trustees of the XYZ scheme

Date

Dear Sir or Madam –**Category B –** Mike Ahmad (deceased)

Date of death: 28th 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
* A lump sum death benefit (LSDB) of £33,682.12 is payable, being the return of the member’s AVC fund value.
* The LSDB is payable to the deceased member’s legal personal representatives / estate.
* The LSDB represents 3.13% of the deceased member’s Lifetime Allowance.
1. Spouse’s pension
* A spouse’s pension is payable of £3,491.37 per annum.
1. Payment of pension
	* The spouse’s pension is payable monthly in advance.
	* The pension will start on 1st September 2021.
	* The pension will be paid for life and will be subject to PAYE.
2. 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.**