**XYZ-Category A (Letter)**

Address to the Trustees of the XYZ Scheme

Date

Dear Sir or Madam

**Re:**  **Linn Sergenson** (deceased) – Date of Death: 7th 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

* There is a lump sum death benefit (LSDB) payable of £43,405.92 (comprising a refund of the deceased member’s scheme contributions of £28,187.27 and a refund of the current value of the deceased member’s AVCs of £15,218.65).
* The LSDB is payable to the legal personal representatives / estate.
* The LSDB represents 4.04% of the deceased member’s Lifetime Allowance.

2. Dependant’s pension

* A dependant’s pension is payable of £6,354.79 per annum, all of which is excess pension.

1. Payment of pension
   * The dependant’s pension is payable monthly in advance.
   * The pension will start on 1st October 2021.
   * The pension will be paid until the child’s 18th birthday and will be subject to PAYE.
2. Pension increases

* The pension in payment will increase each year on 1st April.
* All of the pension of £6,354.79 per annum will increase each year by the lower of the rise in the retail prices index and 5.0%.
  + - 1. Details required

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

* + The member’s original death certificate.
  + The dependant’s original birth certificate.
  + The enclosed bank details form completed by 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.**