**XYZ-Category B (Letter)**

Address to the Trustees of the XYZ scheme (***Category B***)

Date

Dear Sir or Madam   
  
**JOHAN SCHMIDT** (deceased) – Date of death: 7th September 2022

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

1. Spouse’s pension

* A spouse’s pension is payable of £8,063.25 per annum

1. Payment of pension
   * The spouse’s pension is payable monthly in advance
   * The pension will start on 1st October 2022
   * 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 5.0% 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 completed bank details form for the spouse (*form attached*)

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.**