**XYZ-Category B (Letter)**

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

Date

Dear Sir or Madam

**Yung Chen** (deceased) – Date of death: 1st September 2023

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 deceased member was deferred at the date of death, there is a lump sum death benefit (LSDB) payable of £8,591.12 (comprising the deceased member’s current AVC fund value)
* The LSDB is payable to the deceased member’s Legal Personal Representative.
* The LSDB represents 0.80% of the deceased member’s Lifetime Allowance

2. Spouse’s pension

* A spouse’s pension is payable of £12,723.45 per annum

3. Payment of pension

* + The spouse’s pension is payable monthly in advance
	+ The pension will start on 1st October 2023
	+ 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 5.0% 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.