**XYZ-Category B (Letter)**

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

Date

Dear Sir or Madam   
  
**Daniel Kovack** (deceased) – Date of death: 2nd 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

* A lump sum death benefit (LSDB) of £8,119.65 is payable (which is the balance of five years’ pension payments due to the deceased member)
* The LSDB is payable to persons at the Trustees’ discretion (and so confirmation is required of the beneficiaries to be paid and, if there is more than one beneficiary, confirmation is required of the amount to be paid to each beneficiary)
* The LSDB represents 0.75% of the deceased member’s Lifetime Allowance

2. Spouse’s pension

* An augmented spouse’s pension is payable of £20,968.07 per annum, equal to 66.67% of the member’s pension.

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.