**XYZ-Category A (Letter)**

Address to the Trustees of the XYZ Scheme

Date

Dear Sir or Madam

Re: **Tom Dayved** (deceased) **–** Date of Death: 4th 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 £22,124.82 is payable (comprising a refund of the deceased member’s contributions)
* The LSDB is payable to the deceased member’s legal personal representatives / estate
* The LSDB represents 2.06% of the deceased member’s Lifetime Allowance

2. Dependant’s pension

* A dependant’s pension is payable of £4,574.97 per annum

1. Payment of pension
   * The dependant’s pension is payable in monthly instalments in advance
   * The pension will start on 1st October 2023
   * The pension will be payable until the dependant child’s 18th birthday 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 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 completed bank details form for the dependant (*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.*