

**XYZ-Category B (Letter)**

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

Date

Dear Sir or Madam

Re: **Suzanna Holding** (deceased) – Date of Death: 14<sup>th</sup> September 2024

Following notification of this member's death, details of the benefits payable are set out below:

1. Lump sum death benefit

- A lump sum death benefit (LSDB) of £33,069.68 is payable (equal to the balance of five years' pension payments but capped to the deceased member's 75<sup>th</sup> birthday)
- 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 is within the deceased member's available Lump Sum & Death Benefit Allowance (LS&DBA) of £972,685.10

2. Spouse's pension

- A spouse's pension is payable of £8,357.15 per annum

3. Payment of pension

- The spouse's pension is payable in monthly instalments in advance
- The pension will start on 1<sup>st</sup> October 2024
- The pension will be paid for life and will be subject to PAYE

4. Pension increases

- The spouse's pension in payment will be increased each year on 1<sup>st</sup> April by the lower of the rise in the retail prices index and 5.0%

5. 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 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.*