**XYZ Letter**

Address to the Trustees of the XYZ scheme

Date

Dear Sir or Madam

**Re: James Trevor deceased – Category A**

Date of death 13th August 2020

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 member died before normal pension date and was still in service at this point, a lump sum death benefit (LSDB) is payable of £311,395.26, comprising a life assurance amount of £230,136.00 plus a refund of member contributions of £81,259.26.
* The LSDB is payable to persons at the Trustees’ discretion.
* The LSDB represents 29.01% of the deceased member’s Lifetime Allowance.

2. Dependant’s pension

* A dependant’s pension of £14,799.60 per annum is payable.

1. Payment of pension
   * The dependant’s pension is payable monthly in advance.
   * The pension will start on 1st September 2020.
   * The pension will be paid until the child reaches their 18th birthday.
2. Pension increases
   * The pension in payment will increase each year on 1st April.
   * The pension will increase by the rise in the retail prices index or 5% 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 enclosed bank details form completed by the spouse.

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.**