**XYZ-Category B (Letter)**

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

Date

Dear Sir or Madam

**ANA JILLEN** (deceased) – Date of death: 4th September 2022

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 was still in service when she died, there is a lump sum death benefit (LSDB) payable of £201,720.00 (which comprises the deceased member’s life assurance benefit)
* 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 18.79% of the deceased member’s Lifetime Allowance

2. Dependant’s pension

* A dependant’s pension is payable of £5,866.37 per annum
* The dependant’s pension takes into account the deceased member’s part-time service periods

3. Payment of pension

* + The dependant’s pension is payable monthly in advance
	+ The pension will start on 1st October 2022
	+ The pension will be paid until the child dependant reaches his/her 18th birthday
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 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.**