

## **OPQ – Letter**

Address to the Trustees of the OPQ Plan

Date

Dear Sir or Madam

Re: **Penelope Conteh** (deceased) – Date of Death: 9<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**

- The total lump sum death benefit (LSDB) is £561,622.10, comprising:
  - Refund of the deceased member's 'Personal Retirement Account' of £355,957.10 (split between the deceased member's element of £106,405.48 (*plus the transferred-in element of £26,434.28*) and the employer's element of £170,248.77 (*plus the transferred-in element of £52,868.57*))
  - Life assurance benefit of £205,665.00
- The LSDB is payable to persons at the Trustees' discretion, and so the Trustees should confirm to whom the benefits should be paid and in what proportions
- The LSDB is within the deceased member's available Lump Sum & Death Benefit Allowance (LS&DBA) of £986,334.54

### **2. Details required**

Before the LSDB can be put into payment, the following will be required:

- The deceased member's original death certificate

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.*