

XYZ-Category B (Letter)

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

Date

Dear Sir or Madam

Re: **Deta Clemens** (deceased) – Date of Death: 10th September 2025

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

1. Lump sum death benefit

- N/A

2. Spouse's pension

- A spouse's pension is payable of £2,542.75 per annum

3. Payment of pension

- The spouse's pension is payable in monthly instalments in advance
- The pension will start on 1st October 2025
- 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 1st 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.