

## XYZ-Category B (Letter)

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

Date

Dear Sir or Madam

Re: **Daniel Littler** (deceased) – Date of Death: 8<sup>th</sup> September 2025

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

### 1. Lump sum death benefit

- As the deceased member died in active service before normal pension date, a lump sum death benefit (LSDB) is payable of £248,204.42 (comprising the life assurance benefit of £245,970.00 and a refund of the deceased member's transferred-in contributions of £2,234.42)
- 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 £1,073,100.00

### 2. Child dependant's pension

- A child dependant's pension is payable of £11,249.79 per annum (*which includes an element comprising the deceased member's transferred-in pension*)

### 3. Payment of pension

- The child dependant's pension is payable in monthly instalments in advance
- The pension will start on 1<sup>st</sup> October 2025
- The pension will be paid until the child's 18<sup>th</sup> birthday (30/03/2031) and will be subject to PAYE

### 4. Pension increases

- The child dependant'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 child dependant's pension can be put into payment, the following will be required:

- The member's original death certificate
- The child dependant's original birth certificate
- The completed bank details form for the child 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 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.*