

OPQ – Letter

Address to the Trustees of the OPQ Plan

Date

Dear Sir or Madam

Re: **Sarah Humphries** (deceased) – Date of Death: 12th September 2025

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 £399,427.20, comprising:
 - Refund of the deceased member's 'Personal Retirement Account' of £230,977.20 (split between the deceased member's element of £76,624.44, the employer's element of £122,599.10 *and the member's AVC element of £31,753.66*)
 - Life assurance benefit of £168,450.00
- 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 £1,073,100.00

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.