**XYZ-Category B (Letter)**

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

Date

Dear Sir or Madam

Re: **Wesley Roberts** (deceased) **–** Date of Death: 12th September 2024

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

1. Lump sum death benefit

* A lump sum death benefit (LSDB) of £21,829.09 is payable (*comprising a refund of the value of the deceased member’s AVCs*)
* The LSDB is payable to the deceased member’s legal personal representatives / estate
* The LSDB is within the deceased member’s available Lump Sum & Death Benefit Allowance (LS&DBA) of £1,073,100.00

2. Spouse’s pension

* A spouse’s pension is payable of £4,593.60 per annum

1. Payment of pension
   * The spouse’s pension is payable in monthly instalments in advance
   * The pension will start on 1st October 2024
   * The pension will be paid for life and will be subject to PAYE
2. 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%
  + - 1. 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.*