

XYZ-Category B (Letter)

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

Date

Dear Sir or Madam

Re: **Rodney Wark** (deceased) – Date of Death: **17th September 2026**

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 **£25,711.06** 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 **£5,889.46 per annum**

3. Payment of pension

- The spouse's pension is payable in monthly instalments in advance
- The pension will start on **1st October 2026**
- 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 –

For the purposes of the CPC examinations, candidates will be presented with a draft Letter. They will then be expected to:

- a) *Transcribe data required to be populated in the draft Letter accurately from their Case Study answers to the answer box*
- b) *Identify and detail basic expected information not communicated in the draft Letter to the answer box*
- c) *Identify and correct information wrongly communicated in the draft Letter to the answer box*