

OPQ – Letter

Address to the Trustees of the OPQ Plan

Date

Dear Sir or Madam

Re: **Linda Bugner** (deceased) – Date of Death: **15th September 2026**

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 **£138,050.36**, which is the value of the deceased member's 'Personal Retirement Account' (split between the deceased member's element of **£53,096.29** and the employer's element of **£84,954.07**)
- 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. 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 –

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

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