

## OPQ – Letter

Address to the Trustees of the OPQ Plan

Date

Dear Sir or Madam

Re: **Thomas Hagler** (deceased) – Date of Death: **16<sup>th</sup> 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 **£242,448.81**, which is the value of the deceased member's 'Personal Retirement Account' (split between the deceased member's element of **£74,078.68**, the employer's element of **£118,525.88** and the member's AVC element of **£49,844.25**)
- 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*