

**Benefit Crystallisation Event
Member Questionnaire**

Scheme Name: Carolyn Executive Pension Scheme

Member Name: Mr Thomas Renwick

Date of Birth: 29/08/1965

NI Number: NH029843B

Please accept this as my written request to take benefits from the above scheme and confirmation of information in respect of this Benefit Crystallisation Event:

Required Benefits

I wish to vest sufficient funds to provide a Tax Free Cash amount of £10,500

Valuation of your share of fund at the time of crystallization: £81,408.03

Will this be your first Benefit Crystallisation Event occurring on or after 06 April 2006 (under any Registered Pension Scheme)?

Yes

~~No~~

If 'No', what was the date of your first Benefit Crystallisation Event occurring on or after 06 April 2006

Date:

What is the percentage of the SLA used up under those earlier Benefit Crystallisation Events that occurred under any other Registered Pension Scheme you are (or were) a member of, as recorded on your latest scheme statement(s). Copy statement(s) **MUST** be attached.

Name of Registered Pension Scheme:

% SLA

Member Signed:



Date:



Lifetime Allowance Certificate

Scheme Name: Carolyn Executive Pension Scheme

Member Name: Mr Thomas Renwick

Does any of the following protections apply? No

Enhanced Protection

Primary Protection

Fixed Protection 2012

Fixed Protection 2014

Individual Protection 2014

Fixed Protection 2016

Individual Protection 2016

Rate of lifetime allowance at the time of BCE:

£1,073,100

Percentage of lifetime allowance remaining before this BCE:

100%

Percentage of lifetime allowance under this BCE:

7.586%

Percentage of lifetime allowance after this BCE:

92.414%

Date of BCE:

Amount of BCE used:

£42,000 – 51.59%

Signed:

For Scheme Administrator / Practitioner _____

Member Signed:

Tom Renwick

Date:

5/2/21