

**Benefit Crystallisation Event
Member Questionnaire**

Scheme Name: Elljess Investments Ltd Executive Pension Scheme

Member Name: Mrs. Lisa Jane Jones

Date of Birth: 16/10/1962

NI Number: NA373920B

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 – From 20th June 2020 to 20th March 2021 inclusive (a new calculation will be performed from April 2021 onwards)

1. I wish to vest sufficient funds to provide a Tax Free Cash amount of £37,500 (to be paid in monthly instalments of £3,750)
2. I wish to vest sufficient funds to provide an annual Income amount of £12,500 (to be paid in monthly instalments of £1,250)

Valuation of your share of fund at the time of crystallization: £379,321.77

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

Signed:



Date:

24.6.20