

**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 – one-off lump sum request of £10,000

1. I wish to vest sufficient funds to provide a Tax Free Cash amount of £10,000 (to be paid with the monthly instalment of £5,000 on 20th July 2020)

Valuation of your share of fund at the time of crystallization: £329,321.77

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: 20/06/2020

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: Elljess Investments Ltd EPS
12% SLA used, £150,000 crystallised

Signed:

Lisa Jones

Date:

5th July 2020