

**Benefit Crystallisation Event
Member Questionnaire**

Scheme Name: *Leaforce Pension Scheme*

Member Name: *Isabelle Gutteridge*

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

1. I wish to draw all of my fund in Tax Free Cash and Income
2. I wish to vest segments and take as Tax Free Cash and Income
3. I wish to vest sufficient funds to provide a Tax Free Cash amount of £
4. I wish to vest sufficient funds to provide an annual Income amount of £

Other (please detail)

25% Tax free

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:

IS Gutteridge

Date:

09-09-2014

**Benefit Crystallisation Event
Member Questionnaire**

Scheme Name: Leaforge Pension Scheme.

Member Name: Roy Higgins.

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

1. I wish to draw all of my fund in Tax Free Cash and Income
2. I wish to vest segments and take as Tax Free Cash and Income
3. I wish to vest sufficient funds to provide a Tax Free Cash amount of £
4. I wish to vest sufficient funds to provide an annual Income amount of £

Other (please detail)

25% Tax free.

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:

9 Sept 2014

Lifetime Allowance Certificate

Scheme Name:

Member Name:

Does Enhanced Protection apply:

.....

Does Primary Protection apply:

.....

Percentage of lifetime allowance remaining before this BCE:

.....

Percentage of lifetime allowance under this BCE:

.....

Percentage of lifetime allowance after this BCE:

.....

Date of BCE:

.....

Amount of BCE used:

.....

Signed:

For Scheme Administrator

Date:

Lifetime Allowance Certificate

Scheme Name:

Member Name:

Does Enhanced Protection apply:

.....

Does Primary Protection apply:

.....

Percentage of lifetime allowance remaining before this BCE:

.....

Percentage of lifetime allowance under this BCE:

.....

Percentage of lifetime allowance after this BCE:

.....

Date of BCE:

.....

Amount of BCE used:

.....

Signed:

For Scheme Administrator

Date: