

**Benefit Crystallisation Event
Member Questionnaire**

Scheme Name: Lucy Bee SSAS
Member Name: Mr Philip Buckingham
Date of Birth: 28/03/1953
NI Number: YY555517C

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 vest sufficient funds to provide a Tax Free Cash amount of £349,367.78
2. ~~I wish to vest sufficient funds to provide an annual Income amount of £~~

Valuation of your share of fund at the time of crystallization: £1,397,471.10

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

Copy of Certificate for fixed protection attached. Certificate Ref: 8008789P

Signed:



Date:

22/JAN/2020

Lifetime Allowance Certificate

Scheme Name: Lucy Bee SSAS

Member Name: Mr Philip John Buckingham

Does any of the following protections apply?

Enhanced Protection

Primary Protection

Fixed Protection 2012 – Yes – LTA fixed at £1,800,000

Fixed Protection 2014

Individual Protection 2014

Fixed Protection 2016

Individual Protection 2016

Rate of lifetime allowance at the time of BCE: (fixed protection applies)

£1,800,000

Percentage of lifetime allowance remaining before this BCE:

100%

Percentage of lifetime allowance under this BCE:

77.64%

Percentage of lifetime allowance after this BCE:

22.36%

Date of BCE:

20/12/2019

Amount of BCE used:

£1,397,471.10

Signed:

For Scheme Administrator / Practitioner

Date: