

Mrs G Stuliglowa  
Pension Practitioner  
Office 12  
Venture Wales Building  
Pentrebach  
Merthyr Tydfil  
CF48 4DR

2<sup>nd</sup> April 2019

Dear Georgina

**RE: Matlock Ford Directors Pension Scheme – Andrew Green**

Further to your discussions with Rhianna, please find enclosed a completed BCE form for Mr Green, along with an outward payment instruction form so that payment of his PCLS can be made.

I have submitted the withdrawal form directly to Old Mutual to withdraw £50,000 from the trustee investment and this should arrive in the scheme bank account in the next 5-10 working days.

If you have any queries please do not hesitate to contact me.

Yours sincerely



Peter Best *BSc (Hons) DipPFS EFA Cert CII (Life and Pensions)*  
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Partners: D.Thompson MLIBF DipFA, A.R.M.Young DipFA

**Benefit Crystallisation Event  
Member Questionnaire**

**Scheme Name:** Matlock Ford Directors Pension Scheme

**Member Name:** Andrew Green

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 £ 50,000.00
4. I wish to vest sufficient funds to provide an annual Income amount of £

Other (please detail)

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:

2/4/19.

AIB BANK PLC

Sort Code: 23-83-96

## Outward Payment Instruction for Faster Payments

### 1. SCHEME DETAILS

Scheme Name

Account Number

### 2. PAYMENT DETAILS

Date to be actioned

Amount (GBP)

Amount in Words

### 3. BENEFICIARY

Beneficiary Name

Beneficiary Sort Code

Beneficiary Account Number


Payment Reference

### 4. PURPOSE OF TRANSACTION - Description

We authorise the scheme administrator to make the payment on the date stated on this form in accordance with the following authorised account signatures.

### 5. TRUSTEE SIGNATURE

1st Signatory



Name

Date

2nd Signatory - if applicable

Name

Date