

**Benefit Crystallisation Request
Member Questionnaire**

Scheme Name: Networks 2 Business

Member Name: David Skilling

Date of birth: 15.03.1952

Please accept this as my written request to take benefits from the above scheme and confirmation of information in respect of this Benefit Crystallisation Request:

Required Benefits

- ~~1. I wish to draw all of my fund in Tax Free Cash and Income~~
- ~~2. I wish to vest sufficient funds to provide a Tax Free Cash amount~~

Other (please detail)

I wish to vest sufficient funds to provide an annual taxable income of £14,000.

Will this be your first crystallisation of pension benefits (including any Benefit Crystallisation Events occurring between 06 April 2006 and 5th April 2024 under any Registered Pension Scheme)?

Yes

No

If 'No', can you detail all previous occasions where you crystallised pension benefits under any pension arrangement you either hold or held (including the exact dates and the amounts crystallised)? Please attach copy statements.

2016

Old Mutual Wealth - Fully crystallised.

Amount Crystallised: £90,027.05

SLTA Used: 9%

June 2020-2021

Scottish Widows - Total Retirement Income - £178,482.86

Signed:

Date: 03.05.2024

Mr David Kenneth Skilling
13 Hendry Avenue
DENNY
FK6 5ETTelephone: 0345 716 6733
Fax: 0131 655 7004

P60 End of Year Certificate

Dear Sir/Madam

Please keep this certificate in a safe place. You will need it if you have to fill in a Tax Return. You also need it to make a claim for tax credits or to renew your claim. You can also use it to check that we are using your correct National Insurance Number - if this is not the case please contact us.

This certificate shows the total amount of pension, for income tax purposes, that we have paid to you in the year.

By law you are required to tell HM Revenue & Customs of any income that is not fully taxed, even if you are not sent a Tax Return.

The percentage of the Standard Lifetime Allowance used to provide this pension income including any Tax Free element taken from this plan is 16.51%.

When contacting HM Revenue & Customs quote your National Insurance Number and PAYE reference.

Tax Year to 5 April	Policy Number	PAYE reference
2020	40121934	961/8207472

National Insurance Number	Surname and Initials in BLOCK CAPITALS	Final tax code
BT081093B	SKILLING DK	S52M

Scottish Widows	Pension	Tax deducted or refunded (R indicates refund)
	£15,000.00	£2,936.62

Previous employment(s)	Pay	Tax deducted
	£0.00	£0.00

Total for Year	Pension/Pay	Tax deducted
	£15,000.00	£2,936.62

Figures shown here
should be used for your
Tax Return, if you get one.