

**Benefit Crystallisation Event
Member Questionnaire**

Scheme Name: REFLEXOAK LIMITED EXECUTIVE PENSION SCHEME

Member Name: JOHN SAYYA

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 £ 15,122-71
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:

Lifetime Allowance Certificate

Scheme Name:

Member Name:

Does Enhanced Protection apply:

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Does Primary Protection apply:

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Percentage of lifetime allowance remaining before this BCE:

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Percentage of lifetime allowance under this BCE:

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Percentage of lifetime allowance after this BCE:

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Date of BCE:

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Amount of BCE used:

.....

Signed:

For Scheme Administrator

Date: