Benefit Crystallisation Event
Member Questionnaire

Scheme Name: Taipan Retirement Benefits Scheme

Member Name: Anthony John Carson

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

X I wish to draw all of my fund in Tax Free Cash and Income
X I wish to vest segments and take as Tax Free Cash and Income
☑ I wish to vest sufficient funds to provide a Tax Free Cash amount of £40,138.00
X I wish to vest sufficient funds to provide an annual Income amount of £

Other (please detail) Draw down Forty Thousand One Hundred and Thirty-Eight Pounds 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

requested 6/6/2022 } £25,409.23 tax free
paid 17/6/2022 } drawdown

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 TRUE POTENTIAL INVESTMENTS
% SLA 9.47%

Signed: Tony Carson Edwina Carson.

Date: 19.08-2022

Bank account details

Account Name: MR. A. J. CARSON

Sort Code: 30-13-93

Account Number: 51886101

true potential
investments

TPI Pension Lifetime Allowance (LTA) Statement

Account Name: Anthony John Carson
Account Number: P0263-30001-04166

This Statement provides you with details of the Lifetime Allowance you have utilised and is based upon information provided to us by you, your Financial Adviser or your previous pension provider on your behalf.

The Lifetime Allowance (LTA) is the overall limit of tax privileged pension funds you can accrue during your lifetime, before a Lifetime Allowance tax charge applies. The standard Lifetime Allowance is currently £1,073,100.00 (2022-2023).

Request Date	Withdrawal Type	Pre/Post A Day Funds	Pension Scheme	Funds in Drawdown (£)	Lifetime Allowance Used (%)*
07/06/2022	Flexible	Post	TPI Pension	£101,638.90	9.47
Total Lifetime Allowance Used					**9.47%**
Total Lifetime Allowance Remaining					**90.53%**

*% values are rounded down to 2 Decimal Places

IMPORTANT INFORMATION

- Details of your Pension Benefit entitlement can be found on your Benefit Schedule.
- You may have previously elected for protection from paying these charges and if so please provide us with the relevant details.
- In instances where you have acquired Pension Credit rights, please provide us with the relevant details.
- TPI accepts no liability for Lifetime Allowance Percentages calculated for Schemes other than TPI Pension.
- Lifetime Allowance applies to all your benefits in aggregate whether under this scheme or elsewhere.
- The Total Lifetime Allowance amounts are subject to change with future Withdrawal Events.
- You will receive a Lifetime Allowance Statement annually and after every Withdrawal Event under the TPI Pension.

If you have any questions about this statement, please contact your Financial Adviser to whom a copy has been made available.