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LICENSED  
CREDIT  
BROKER  
CCL No.  
184549

*FAO - Emily Malster*



*Please see enclosed documentation relating to the  
crystallisation events for the below referenced:*

- \* Carol Foote - Titen Funding Trustee Scheme*
- \* Peter Roberts - P Varley Limited Pension Scheme*
- \* Bernard Ellis - P Varley Limited Pension Scheme*

*With Compliments*

*Yours Sincerely*

Authorised and Regulated by the  
Financial Conduct Authority  
Ref. 402391  
Data Protection Number: ZA084344

**Benefit Crystallisation Event  
Member Questionnaire**

**Scheme Name: Titan Funding Trustee Scheme**

**Member Name: Carol Foote**

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

Other (please detail) I wish to vest a one off income payment of £25,000 gross, £20,000 net

Will this be your first Benefit Crystallisation Event occurring on or after 06 April 2006 (under any Registered Pension Scheme ?

No

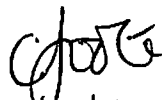
If 'No', what was the date of your first Benefit Crystallisation Event occurring on or after 06 April 2006

Date: \_\_12/06/2015

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; Titan Funding Trustee Scheme**  
**% SLA : 4.28**

Signed:



Date:



## **Lifetime Allowance Certificate**

**Scheme Name: Titan Funding Trustee Scheme**

**Member Name: Carol Foote**

**Does Enhanced Protection apply:**

**No**

**Does Primary Protection apply:**

**No**

**Percentage of lifetime allowance remaining before this BCE:**

**95.72%**

**Percentage of lifetime allowance under this BCE:**

**4.28%**

**Percentage of lifetime allowance after this BCE:**

**4.28%**

**Date of BCE:**

**04/02/2016**

**Amount of BCE used:**

**£53,000.00**

**Signed:**

**For Scheme Administrator**

**Date:**

**Benefit Crystallisation Event  
Member Questionnaire**

**Scheme Name: P Varley Limited Pension Scheme**

**Member Name: Mr Peter Mitchell Roberts**

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 £21,198.90
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

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: P Varley Limited Pension Scheme**  
**% SLA: 6.78%**

Signed:



Date:

22-2-2016

### **Lifetime Allowance Certificate**

**Scheme Name: P Varley Limited Pension Scheme**

**Member Name: Mr Peter Mitchell Roberts**

**Does Enhanced Protection apply:**

No

**Does Primary Protection apply:**

No

**Percentage of lifetime allowance remaining before this BCE:**

100%

**Percentage of lifetime allowance under this BCE:**

6.78%

**Percentage of lifetime allowance after this BCE:**

6.78%

**Date of BCE:**

.....

**Amount of BCE used:**

£84,795.60

**Signed:**

**For Scheme Administrator**

**Date:**

**Benefit Crystallisation Event  
Member Questionnaire**

**Scheme Name: P Varley Limited Pension Scheme**

**Member Name: Mr Bernard Ellis**

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 £13,667.01
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 ✓

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 - *P Varley Limited Pension Scheme.*  
% SLA: 4.37%

Signed: 

Date: *29.2.2016*

### **Lifetime Allowance Certificate**

**Scheme Name:** P Varley Limited Pension Scheme

**Member Name:** Mr Bernard Ellis

**Does Enhanced Protection apply:**

No

**Does Primary Protection apply:**

No

**Percentage of lifetime allowance remaining before this BCE:**

100%

**Percentage of lifetime allowance under this BCE:**

4.37%

**Percentage of lifetime allowance after this BCE:**

4.37%

**Date of BCE:**

26/02/2016

**Amount of BCE used:**

£54,668.04

**Signed:**

**For Scheme Administrator**

**Date:**