Benefit Crystallisation Event
Member Questionnaire

Scheme Name: ....Turtle Family Pension fund

Member Name: ....Paul Turtle..................

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 30,000.
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: June 2013.

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:

1.25.

Lifetime Allowance Certificate

Scheme Name: Turtly Family Pension Fund

Member Name: Paul Turtle

Does any of the following protections apply?

Enhanced Protection	Y / N
Primary Protection	Y / N
Fixed Protection 2012	Y / N
Fixed Protection 2014	Y / N
Individual Protection 2014	Y / N
Fixed Protection 2016	Y / N
Individual Protection 2016	Y / N

Rate of lifetime allowance at the time of BCE:

1.25m

Percentage of lifetime allowance remaining before this BCE:

66.13%

Percentage of lifetime allowance under this BCE:

9.6%

Percentage of lifetime allowance after this BCE:

56.53%

Date of BCE:

18 November 2015.

Amount of BCE used:

£120,000

Signed:
For Scheme Administrator

Date:

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