

**Benefit Crystallisation Event
Member Questionnaire**

Scheme Name: UNIVERSAL GROUP EXECUTIVE PENSION FUND

Member Name: PHILLIP HOLLAND

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 **£ 35,000**
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: _____

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: 17/1/2019

Lifetime Allowance Certificate

Scheme Name: UNIVERSAL GROUP EXECUTIVE PENSION FUND

Member Name: PHILLIP HOLLAND

Does any of the following protections apply?

Enhanced Protection	Y / <input checked="" type="radio"/> N
Primary Protection	Y / <input checked="" type="radio"/> N
Fixed Protection 2012	Y / <input checked="" type="radio"/> N
Fixed Protection 2014	Y / <input checked="" type="radio"/> N
Individual Protection 2014	Y / <input checked="" type="radio"/> N
Fixed Protection 2016	Y / <input checked="" type="radio"/> N
Individual Protection 2016	Y / <input checked="" type="radio"/> N

Rate of lifetime allowance at the time of BCE:

£ 1,030,000

Percentage of lifetime allowance remaining before this BCE:

100%

Percentage of lifetime allowance under this BCE:

13.59%

Percentage of lifetime allowance after this BCE:

86.41%

Date of BCE:

17 JANUARY 2019

Amount of BCE used:

13.59%

Signed:


For Scheme Administrator

Date:

17/1/2019