

**Benefit Crystallisation Event
Member Questionnaire**

Scheme Name: Welch Investments Pension Scheme

Member Name: Simon John Welch

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 £6,000.00-£17,000
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

24/01/2018 – PCLS of £50,000.00
10/04/2019 – PCLS of £5,000.00
26/06/2019 – PCLS of £130,000.00
04/09/2019 – PCLS of 35,000
11/11/2019 – PCLS of 24,000

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: 10/02//2020