**XYZ Letter**

Address to the Trustees of the XYZ scheme

Date

Dear Sir or Madam

**Re:**  **Victoria Archer** deceased – Category A

Date of death: 1st August 2020

Further to notification of the death of this member, details of the benefits payable are set out below:

1. Lump sum death benefit

* There is a lump sum death benefit (LSDB) payable of £32,290.00, this being a refund of the deceased member’s contributions.
* The LSDB is payable to the legal personal representatives / estate.
* The LSDB represents 3.00% of the deceased member’s Lifetime Allowance.

2. Dependant’s pension

* A spouse’s pension is payable of £8,517.35 per annum.
* £900.64 per annum is the post-1988 Widower’s Guaranteed Minimum Pension (WGMP) element.
* £7,616.71 per annum is the balance over and above the WGMP element.

1. Payment of pension
   * The dependant’s pension is payable monthly in advance.
   * The pension will start on 1st September 2020.
   * The pension will be subject to PAYE.
2. Pension increases

* The pension in payment will increase each year on 1st April.
* The post-1988 WGMP of £900.64 per annum will increase by the rise in the consumer prices index or 3% if less.
* The balance of the pension of £7,616.71 per annum will increase by the rise in the retail prices index or 5% if less.
  + - 1. Details required

Before the spouse’s pension can be put into payment, the following will be required:

* + The member’s original death certificate.
  + The member and spouse’s original marriage certificate.
  + The spouse’s original birth certificate.
  + The enclosed bank details form completed by the spouse.

If you have any queries, please contact me.

Yours faithfully

A N Other

**NOTE** –

**Letters should be written in full** **and should include all of the information contained in each of the bullet points.**

**Failure to write a letter in full will result in marks being lost.**

**Failure to mention the information contained in each of the bullet points will result in marks being lost.**