



# Carter & Coley

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14 May 2012

Dear Brad,

**Allied (Tooling) Ltd RBS**

Please find form completed by Steve Viney.

Should you have any queries in connection with the above, please do not hesitate to contact me.

Yours sincerely,

Andrew Clark  
[andrew@carter-coley.co.uk](mailto:andrew@carter-coley.co.uk)

**Benefit Crystallisation Event  
Member Questionnaire**

**Scheme Name:**

**Member Name:**

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)

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

Yes ✓

~~No~~

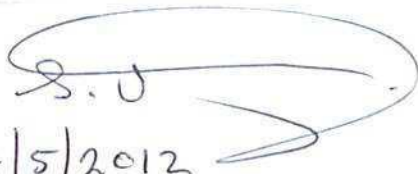
If 'No', what was the date of your first Benefit Crystallisation Event occurring on or after 06 April 2006

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:

4/5/2012

## **Lifetime Allowance Certificate**

**Scheme Name:** Allied (Tooling) Limited Pension Plan

**Member Name:** Steve Viney

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:

8.39%

Percentage of lifetime allowance after this BCE:

91.61%

Date of BCE:

12<sup>th</sup> June 2012

Amount of BCE used:

£583,780

Signed:

**For Scheme Administrator**

Date: