

Benefit Crystallisation Event Member Questionnaire

Scheme Name: ARGILE PRIVATE PENSION SCHEME

Member Names: HARRY CLAY & KATHLEEN MARY CLAY

Please accept this as our written request to take benefits from the above scheme and confirmation of information in respect of this Benefit Crystallisation Event:

Required Benefits

- | | | |
|--------------|---|--------------------------|
| 1 | We wish to draw all of our fund in Tax Free Cash and Income | <input type="checkbox"/> |
| 2 | We wish to vest segments and take a Tax Free Cash and Income | <input type="checkbox"/> |
| 3 | We wish to take tax free cash only and take no Income at this time. | <input type="checkbox"/> |
| 4 | We wish to vest sufficient funds to provide an annual Income only and defer my tax free cash | <input type="checkbox"/> |

Please tick 1 box only

The maximum lump sum you can take amounts to one quarter of the value of the pension fund at the date of crystallisation.

- 1 Will this be your first Benefit Crystallisation Event occurring on or after 06 April 2006 (under any Registered Pension Scheme)? YES (If yes, go straight to Question 3)
- 2 If 'No', what was the date of your first Benefit Crystallisation Event (BCE) occurring on or after 06 April 2006

Date: _____

Now sign, date and return this form to Pension Practitioner .Com.

- 3 What is the percentage of the Standard Lifetime Allowance 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)?

Now sign, date and return this form to Pension Practitioner .Com, with a copy of your Lifetime Allowance Certificate if a percentage had been inserted below.

% SLA: NIL

Signed:

HARRY CLAY

Date:

23 APR 10

Signed:

KATHLEEN MARY CLAY

Date:

23.04.2010

**Benefit Crystallisation Event
Member Questionnaire**

Scheme Name: Argile Private Pension Scheme

Member Name: Harry Clay

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 £100,000
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: 26 April 2010

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 : Argile Private Pension Scheme

% SLA : 73,33%

Signed:

 H. N. Clay

Date: 1st November 2013