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**PROJECT PLANNING**  
PLAN MONITOR CONTROL

Gina / Gavin,

As requested please find enclosed completed &  
signed Crystallisant Event Member Questionnaires

Kind regards, Patricia

Merry Xmas & a Happy New Year

**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 £10,000
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**

John Dingle Project Planning Ltd  
Retirement Benefit Scheme

Signed: 

Date: 11/11/14

### Lifetime Allowance Certificate

**Scheme Name:**

**Member Name:**

Does Enhanced Protection apply:

..... *No* .....

Does Primary Protection apply:

..... *No* .....

Does Fixed Protection apply:

..... *No* .....

Does Fixed Protection 2014 apply:

..... *No* .....

Percentage of lifetime allowance remaining before this BCE:

..... *100%* .....

Percentage of lifetime allowance under this BCE:

..... *3.2%* .....

Percentage of lifetime allowance after this BCE:

..... *96.8%* .....

Date of BCE:

.....

Amount of BCE used:

..... *£10,000* .....

Signed:

**For Scheme Administrator**

-

Date:

### 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 £10,000
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: 11 November 2014

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**

John Dring Project Planning Ltd  
Retirement Benefit Scheme

Signed: J Dring  
Date: 12/11/14

### Lifetime Allowance Certificate

**Scheme Name:**

**Member Name:**

Does Enhanced Protection apply:

..... *No* .....

Does Primary Protection apply:

..... *No* .....

Does Fixed Protection apply:

..... *No* .....

Does Fixed Protection 2014 apply:

..... *No* .....

Percentage of lifetime allowance remaining before this BCE:

..... *96.8%* .....

Percentage of lifetime allowance under this BCE:

..... *3.2%* .....

Percentage of lifetime allowance after this BCE:

..... *93.6%* .....

Date of BCE:

.....

Amount of BCE used:

..... *£10,000* .....

Signed:

**For Scheme Administrator**

Date:

### 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 £10,000
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: 11 November 2014

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**

*John Dingle Project Planning Ltd  
Retirement Benefit Scheme*

Signed: *[Signature]*  
Date: *3/12/14*

### Lifetime Allowance Certificate

**Scheme Name:**

**Member Name:**

Does Enhanced Protection apply:

..... *No* .....

Does Primary Protection apply:

..... *No* .....

Does Fixed Protection apply:

..... *No* .....

Does Fixed Protection 2014 apply:

..... *No* .....

Percentage of lifetime allowance remaining before this BCE:

..... *93.6%* .....

Percentage of lifetime allowance under this BCE:

..... *3.2%* .....

Percentage of lifetime allowance after this BCE:

..... *90.4%* .....

Date of BCE:

.....

Amount of BCE used:

..... *£10,000* .....

**Signed:**

**For Scheme Administrator**

Date:

**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 £10,000
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: 11 November 2014

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**

John Dingle Project Planning Ltd  
Retirement Benefit Scheme

Signed: J E Dingle

Date: 16/12/14



# **Lifetime Allowance Certificate**

**Scheme Name:**

**Member Name:**

Does Enhanced Protection apply:

*No*

Does Primary Protection apply:

*No*

Does Fixed Protection apply:

*No*

Does Fixed Protection 2014 apply:

*No*

Percentage of lifetime allowance remaining before this BCE:

*90.4%*

Percentage of lifetime allowance under this BCE:

*3.2%*

Percentage of lifetime allowance after this BCE:

*87.2%*

Date of BCE:

.....

Amount of BCE used:

*£10,000*

Signed:

**For Scheme Administrator**

Date:

**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 £ 70,000
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: 11 November 2014

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**

*John Dingle Project Planning Ltd  
Retirement Benefit Scheme*

Signed: *J E Dingle*  
Date: *18/12/14*

**Lifetime Allowance Certificate****Scheme Name:****Member Name:**

Does Enhanced Protection apply:

*No*

Does Primary Protection apply:

*No*

Does Fixed Protection apply:

*No*

Does Fixed Protection 2014 apply:

*No*

Percentage of lifetime allowance remaining before this BCE:

*87.2%*

Percentage of lifetime allowance under this BCE:

*22.4%*

Percentage of lifetime allowance after this BCE:

*64.8%*

Date of BCE:

Amount of BCE used:

*£70,000*

Signed:

**For Scheme Administrator**

Date: