Benefit Crystallisation Event Member Questionnaire

Scheme Name: ……Lucy Bee SSAS…………………………………………

Member Name: ………Natalie Buckingham……………………………………..

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 £18,000
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

Signed:

Date:

Beneficiary Account details: Account Name: P&N Buckingham

Sort Code 60-95-34

Account Number 12122790