



**LUCY BEE SSAS**  
**VALUATION & BENEFIT STATEMENT AS AT 05 APRIL 2021**

Name	Lucy Willis	Date of Birth	04/04/1991
Sex	Female	Marital Status	TBA
National Insurance No.	TBA	Spouse's D.O.B.	

**CONTRIBUTIONS TO YOUR PENSION ACCOUNT**

Employer contributions to the fund from 06 April 2020 to 05 April 2021	£50,000.00
Your contributions to the fund from 06 April 2020 to 05 April 2021	£0.00

**FUND MOVEMENTS**

Partial Pension Commencement Lump Sum Payment to member	£0.00
Transfer of Pension Benefits into the Scheme on behalf of the member	£0.00

**YOUR SHARE OF FUND**

Your share of the fund as at 05 April 2021 (£)	£50,000.00
Your share of the fund as at 05 April 2021 (%)	TBC

This is a retirement illustration forecast to a notional retirement age of 65.

The value of your fund as at 05 April 2021 is £50,000

If you continue working until your retirement age your fund value will be £704,429

This will produce a tax free cash of £176,107 and a pension income of £27,245 p.a.

Notes:

This benefit statement is for illustration purposes only and is not guaranteed.

It has been assumed that:

1. Investments increase by 5% p.a. until retirement.
2. Contributions continue until NRA.
3. Expenses before retirement are 1% of the value of the scheme.
4. The pension is on a single life basis, non-increasing, payable monthly in advance.
5. The figures are stated in today's terms, this means that inflation is compounded annually at 2.5%. The income has been discounted back allowing for this inflation rate.
6. Values have been calculated based on the fund splits provided to us, otherwise we have assumed an equal entitlement to funds for all members of the pension scheme.

Should you require a more detailed calculation specific to your requirements, including a target-benefits statement for retirement at a future date please contact Pension Practitioner.