

Sent by email to Simon 20/4/23.

Benefit Crystallisation Event
Member Questionnaire

Scheme Name: Priority Gate SSAS

Member Name: David Corran

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 £ 200,000 = 00
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:


20/4/23

Beneficiary Account Details

Account Name: Mrs D T CURRAN & Mrs A M CURRAN
Account number: 81741640
Sort Code: 40-47-79
Reference: GIFT TO MICHAEL