

**Benefit Crystallisation Event  
Member Questionnaire**

**Scheme Name:** REFLEXOAK LIMITED EXECUTIVE PENSION SCHEME

**Member Name:** JOHN SAYYA

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 £ 15,122-71
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:

## **Lifetime Allowance Certificate**

**Scheme Name:** Reflexoak Limited Executive Pension Scheme

**Member Name:** John Savva

Does Enhanced Protection apply:

No

Does Primary Protection apply:

No

Percentage of lifetime allowance remaining before this BCE:

100%

Percentage of lifetime allowance under this BCE:

4.03%

Percentage of lifetime allowance after this BCE:

95.97%

Date of BCE:

19<sup>th</sup> July 2012

Amount of BCE used:

£60,490.84

Signed:

**For Scheme Administrator**

Date: