


Date	21 July 2015	Our Ref	Laura M Surtees
FAO Brad Davies / Tony McCartney Pension Practitioner Daws House 33-35 Daws Lane London NW7 4SD		Tilney Bestinvest Financial Planning (National) Northern Assurance Buildings 9/21 Princess Street Manchester M2 4DN Tel: 0161 832 6413 FCA No: 134190	
Department:		Your Ref	
Client Name	SPM SSAS		
Enclosed:		Required	
	Anti Money Laundering Documents	X	Acknowledgement
	Application Form		Investment Schedule
	DDM / Cheque		Policy Documents
	Top Up Application		Commission
	Investment Managers Agreement	X	Confirmation of income set up
	Surrender Form to fully encash the bond		Terms
	Original Plan documents		
X	2 x Member Questionnaires		

Following on from Ann-Marie's recent correspondence I take pleasure in enclosing the signed Member Questionnaires in order for both Les and Linda Buckley to start taking income from the SSAS.

- Les - £62,000 gross per annum
- Linda - £12,000 gross per annum

Should you require any further information please contact me on 0161 832 6413 or via email: laura.surtees@tilneybestinvest.co.uk

Kind regards



**Benefit Crystallisation Event
Member Questionnaire**

Scheme Name: SPM SSAS
Member Name: LESLIE BUCKLEY

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 £
4. ☒ I wish to vest sufficient funds to provide an annual Income amount of £ 62,000 Gross

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: AUGUST 2011

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: 20/7/15

Lifetime Allowance Certificate

Scheme Name:

Member Name:

Does Enhanced Protection apply:

.....

Does Primary Protection apply:

.....

Percentage of lifetime allowance remaining before this BCE:

.....

Percentage of lifetime allowance under this BCE:

.....

Percentage of lifetime allowance after this BCE:

.....

Date of BCE:

.....

Amount of BCE used:

.....

Signed:

For Scheme Administrator

Date:

**Benefit Crystallisation Event
Member Questionnaire**

Scheme Name: SPM SSAS

Member Name: MARY LINDA BUCKLEY

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 £
4. I wish to vest sufficient funds to provide an annual Income amount of £ 12,000 GROSS

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: AUGUST 2011

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: M.L. Buckley

Date: 20/7/2015

Lifetime Allowance Certificate

Scheme Name:

Member Name:

Does Enhanced Protection apply:

.....

Does Primary Protection apply:

.....

Percentage of lifetime allowance remaining before this BCE:

.....

Percentage of lifetime allowance under this BCE:

.....

Percentage of lifetime allowance after this BCE:

.....

Date of BCE:

.....

Amount of BCE used:

.....

Signed:

For Scheme Administrator

Date: