

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 £ BALANCE OF ALL UNCRYSTALLISED FUNDS.
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:

M.L. Buckley

Date:

13/1/17

Lifetime Allowance Certificate

Scheme Name: SPM SSAS

Member Name: MARY BUCKLEY

Does Enhanced Protection apply:

No

Does Primary Protection apply:

No

Percentage of lifetime allowance remaining before this BCE:

64.15%

Percentage of lifetime allowance under this BCE:

19.20%

Percentage of lifetime allowance after this BCE:

44.95%

Date of BCE:

20/01/2017

Amount of BCE used:

£192,067.12

X M.C. Buckley 

Signed:

For Scheme Administrator



Date: 13/1/17