

**Benefit Crystallisation Event
Member Questionnaire**

Scheme Name: Tech Step Development Pension

Member Name: Michael Beard

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 £

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: Tech Step Development Pension

Member Name: Michael Beard

Does any of the following protections apply?

Enhanced Protection	Y / N
Primary Protection	Y / N
Fixed Protection 2012	Y / N
Fixed Protection 2014	Y / N
Individual Protection 2014	Y / N
Fixed Protection 2016	Y / N
Individual Protection 2016	Y / N

Rate of lifetime allowance at the time of BCE:

1.25m

Percentage of lifetime allowance remaining before this BCE:

100%

Percentage of lifetime allowance under this BCE:

9.6%

Percentage of lifetime allowance after this BCE:

90.4%

Date of BCE:

25/11/2011

Amount of BCE used:

£120,000

Signed:

For Scheme Administrator

Date: