

**Benefit Crystallisation Event
Member Questionnaire**

Scheme Name: The Specialised Unit Handling Limited Executive Pension Scheme

Member Name: Douglas Grant

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 £312500
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

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: The Specialised Unit Handling Limited Executive Pension Scheme

Member Name: Douglas Grant

Does Enhanced Protection apply:

.....

Does Primary Protection apply:

.....

Does Fixed Protection apply:

YES.....

Percentage of lifetime allowance remaining before this BCE:

.....

Percentage of lifetime allowance under this BCE:

.....100%.....

Percentage of lifetime allowance after this BCE:

.....

Date of BCE:

14 October 2020.....

Amount of BCE used:

£1250000.....

Signed: *G.A. McCloskey*

For Scheme Administrator

Date: 13 October 2020

TRUSTEES RESOLUTION

Date:

The Trustees of the Scheme known as The Specialised Unit Handling Limited Executive Pension Scheme are desirous to apportion the assets of the Scheme having regard to the need to pay retirement benefits to Douglas Grant.

The Trustees Resolve that:

Douglas Grant's ("the member") allocation of assets is presently 48.845% of the whole fund. An adjustment shall be applied by the Scheme Practitioner taking into account an adjustment of pension rights arising from drawdown of pension income by Glenda Grant. A further adjustment shall be made by the Scheme Practitioner reflecting the greater proportion of property held in the Scheme forming part of the member account.

Having regard to the requirement to provide liquidity for the settlement of retirement benefits, the Trustees shall settle benefits by way of utilising cash held in the Scheme account and have been notified by the Scheme Practitioner that the "applicable amount" for the member's account is £312500 represented by 25% of £1,250,000.

Applicable amount shall have the meaning in Paragraph 3 Schedule 29 Finance Act 2004.

Signed:

Signed:

Signed: