

PENSION BENEFIT STATEMENT

FROM 1 APRIL 2020 TO 31 MARCH 2021

YOUR DATA Phillip Holland

Scheme Status: Pensioner

Member Status: Trustee

Key Contacts

Financial Advisor

Mark Soper

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Scheme Administration

Emily McAlister

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1. How your pot has changed in the last 12 months

£ 11880

This is the net change in underlying assets from the scheme.



This is the value of your crystallised pension pot on 31 March 2021

2. How much money could you drawdown as income



£ 4345

Retirement Income

You can drawdown a pension income from the scheme. This is based on gilt yields prevailing at the scheme anniversary date which is subject to change.

You can also access flexi-access drawdown which means you can take as much or as little income as you need.

3. Your pension plan at a glance

Your pension plan is a small self administered scheme

You hold
£64380

Your pension is currently invested in cash, funds and property

84 % in Property
15 % in Funds
1% in Cash

Your beneficiaries

If you die your beneficiaries will receive:

£64380



4. Other important information

Your income forecast is based on certain assumptions which are as follows:

We assume a gilt rate of 0.75%.

The pension income is on a single life basis

No increases are held in reserve for pensions in payment

We do not assume any additional increase in scheme assets under GAD rules

The income is payable now

The mortality assumptions are in line with the Government Actuaries Dept rates for a male