

Private and confidential

► *For your records*

23 May 2024

Dear

Your tax-free allowances

Customer name:

Account number: AC200000-003

Financial adviser:

There are limits on how much tax-free cash you can take from your pension and this letter is to keep you updated on how much you have taken from this account.

Date of withdrawal	Amount Paid	Lump Sum Allowance	Lump Sum and Death Benefit Allowance
23/05/2024	£25,000.00	£25,000.00	£25,000.00
Total used on your account		£25,000.00	£25,000.00

You can find more information about these allowances below.



You can normally take 25% of your pension tax free, however there is an overall limit to how much tax-free cash you can take in total. This limit is called the **Lump Sum Allowance (LSA)**.

There is also an overall limit on the amount that can be taken from your pension tax free during your lifetime and by your beneficiaries after your death. This limit is called the **Lump Sum and Death Benefit Allowance (LSDBA)**.



Your financial adviser can tell you more about these limits and what they mean for you.



If you have any questions, please contact your financial adviser who will be able to help you. Alternatively, you can call or email us using the details shown and we will be happy to help. Our Customer Service Centre is open 8.30am – 5.30pm, Monday to Friday.

Yours sincerely

A handwritten signature in black ink that reads "Callum Earl".

Callum Earl

Head of Client Services

If your account with us is looked after by your financial adviser, a copy of this letter will be available for them to view online.

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