



Nomination Form

Please complete all relevant sections and return to The Pensions Trust.

Who will receive your benefits should you die before retirement?

EMPLOYEE DECLARATION

Full Name of Member: _____

Address: _____

Postcode: _____ Email: _____

Telephone Number: _____

Membership Number (if known): M

I confirm that these are my wishes at the date below and that if my circumstances change I will advise The Pensions Trust of this.

Signed: _____ **Date:** ____/____/____

Please note: This nomination will be automatically revoked by your later marriage, civil partnership, divorce or dissolution of a civil partnership. You should ensure that you complete a new nomination in these circumstances, particularly if you wish this nomination to stand.

1. Provision of survivor's pension (Do NOT complete this section if you are a member of the Flexible Retirement Plan or Growth Plan Series 4)

This is conditional on the Scheme providing and/or you having chosen to provide this benefit.

In the event of your death, a pension will be provided to your survivor, payable for the rest of his or her life. The notes overleaf explain your choice and who can receive the benefit. Please indicate below who is to receive the survivor's pension on your death.

Full Name: _____

Relationship: _____ Date of Birth: ____/____/____

Address: _____

Postcode: _____

2. Payment of lump sum death benefits

Please nominate below who you wish to receive the lump sum benefit on your death. There is no limit to the number of beneficiaries (see notes overleaf). If you wish to share the lump sum between two or more people please use an extra sheet. Please ensure the total adds up to 100%.

Full Name: _____ Relationship: _____

Date of Birth: ____/____/____ Proportion: _____ %

Address: _____

Postcode: _____

The Pensions Trust

Notes on death benefits

1. Lump sum death benefit

- (a) You may nominate any one or more persons or organisations to receive this. You must use the name of a person or organisation and not your 'Estate' or the title 'Executor' or 'Administrator'.
- (b) Any nomination will be revoked automatically by the death of the person(s) nominated.
- (c) You may change your nomination at any time. Please obtain a further form from The Pensions Trust if you wish to do so.
- (d) The Pensions Trust has discretion over who is to receive the benefit and, in exceptional circumstances, where no information is available, reserves the right to retain all or part of the value of the benefit within the assets of the Scheme.

2. Survivor's pension

- (a) You do not have to nominate anyone now. If you wish to do so later or you wish to change your nomination, please contact The Pensions Trust.
- (b) You may only nominate one person. This pension cannot be shared except in the circumstances of the following paragraph.
- (c) An amount equivalent to the Widow(er)'s Guaranteed Minimum Pension (GMP) (if any) and Reference Scheme Widow(er)'s Pension must be paid to a legal spouse or civil partner. Therefore, if you are legally married or have a legal civil partner you can allocate only the excess to someone other than your legal spouse or civil partner.
- (d) Any nomination will be revoked automatically by the death of the person nominated, or by your later marriage, civil partnership, divorce or dissolution of a civil partnership. If you wish your original nomination to stand you must confirm this in writing to The Pensions Trust.
- (e) As the choice of beneficiary has widened to the maximum permitted extent, it is important for you to exercise your right to nominate wherever possible. Eligibility will have to be confirmed before payment commences.
- (f) If on your death there is no valid nomination, The Pensions Trust has discretion to pay the benefits to any eligible beneficiary but has the right to retain all or part of the benefit within the Scheme.

3. Who can receive the survivor's pension?

- (a) Your spouse or civil partner.
 - (b) Anyone who lives with you and shares the living expenses or anyone who is largely financially dependent on you. A child may only be nominated as detailed below.
 - (c) You may nominate a child (of any age) who is disabled and is unable to earn a living (in this case the child would be paid the survivor's pension, but not the child's pension).
 - (d) You may nominate a dependent child to receive the survivor's pension only up to the date he or she ceases to be treated as a 'Child' as described in the Trust Deed and Rules (in this case the child would be paid the survivor's pension, but not the child's pension).
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The Pensions Trust

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