Expression of wishes form

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| --- | --- |
| Member Name | Scheme Name and Number |
|  |  |

Under the provisions of the pension scheme detailed above, any payments due on the death of a member are made at the discretion of the scheme Trustees, as directed by the scheme administrator. In order that the scheme administrator is aware of the members wishes, the member is completing this ‘Expression of Wishes’ form. Details can be changed at any time by completing a new form to replace earlier instructions.

The amounts payable on death can be very valuable so it is important that members consider what their wishes are. Also, it is recommended that such statements are updated at regular intervals, particularly when there is a change in personal circumstances.

Once completed, you should speak to your individual pension provider and provide them with a copy of the form to ensure that it is valid and so they have a record of your wishes on file.

**Declaration**

I understand that the scheme Trustees have absolute discretion as to how to pay any lump sum and/or spouse’s/dependant’s income in the event of death. However, if and when the scheme Trustee exercises its discretion, I would like it to take into account my wishes as to how benefits should be paid, as stated below. I understand that I can change or cancel this statement at any time, and that the scheme administrator and trustees will refer to the latest completed version.

I understand that if the scheme Trustees choose a beneficiary that is not named in this form, typically drawdown income would only be available in limited circumstances. Therefore in addition to the below, I nominate any individual who is eligible to receive a lump sum on my death under the rules of the scheme, in order to allow the trustees and administrator to pay drawdown income to as wide a range of beneficiaries as possible and for the purposes of the relevant tax legislation.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name of person / trust / charity I wish to benefit  | Relationship to me | Address | Date of birth / date of trust | Proportion / Order of preference & notes\* |
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| Notes |  |
| SignatureX. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .  | Date  |  |

\*Totals for order of preference must add up to 100%. For example:

Mrs Josaphine Bloggs: 1st - 100%

Master Willian Bloggs: 2nd - 50%

Miss Linda Bloggs: 2nd - 50%