

Expression of Wish Form

Please read the special notes on the back of this form then complete, using CAPITAL LETTERS and return to the Pensions Office, University of Reading, Whiteknights, PO Box 217, Reading, RG6 6AH.

Surname

First name(s)

Mr/Mrs/Miss/Ms

Employee Number

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National Insurance Number

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In the event of my death, I wish the Trustees to exercise their discretion under the Fund Rules so that any lump sum death benefit will be paid to or for the benefit of the following people in the proportions shown.

1	Name _____	2	Name _____
	Address _____		Address _____
	_____		_____
	Relationship _____		Relationship _____
	Proportion _____		Proportion _____
3	Name _____	4	Name _____
	Address _____		Address _____
	_____		_____
	Relationship _____		Relationship _____
	Proportion _____		Proportion _____

I understand that this is only an expression of my wishes which is not binding on the Trustees. It may be revoked or revised at any time in a further form or letter from me.

I authorise the Trustees to hold, and in the event of my death, to use this information in accordance with the requirements of the Data Protection Act 1998.

Signed _____ Dated ____/____/____

SPECIAL NOTES

- 1 Under present law, lump sum death benefits under the Fund can be paid at the discretion of the Trustees direct to your beneficiaries without any tax liability. Your beneficiaries are defined in the Fund Rules as:
 - your widow, widower or surviving civil partner;
 - your grandparents and their descendants and the spouses, civil partners, widows, widowers and surviving civil partners of those descendants;
 - your dependants;
 - any person with an interest in your estate, except the Crown, the Duchy of Lancaster or the Duke of Cornwall; and
 - any person nominated by you in writing to the Trustees.
- 2 You should tell the Trustees who you wish to be treated as your beneficiary(ies) by filling in the form overleaf. The Trustees will give every consideration to your wishes before paying any lump sums but your nomination is not legally binding on them.
- 3 You can change your nomination whenever you want, and you should always keep your expression of wish form up to date.
- 4 Although the form allows space for up to four nominations, there is no restriction on the number of people you can nominate. Please write a letter to the Trustees if the form does not meet your needs. Please make sure the proportions add up to 100%.
- 5 Your nomination will be treated as confidential in any event but you may want to place your completed form in a sealed envelope which will only be opened if you die. If you do place your form in a sealed envelope, you should mark the envelope clearly 'Expression of Wish Form' and show your name, National Insurance number, the University's name and the date.