

University of Reading Pension Scheme

Expression of wish form

Section 1 Personal details

1.1 Member's full name	_____
1.2 Title	_____
1.3 Sex	_____
1.4 National Insurance no.	_____
1.5 Employee number	_____

Completing this form

Please read the special notes on the back of this form then complete, using CAPITAL LETTERS.

Returning this form

Please return this form to:
**Pensions Office, University of Reading, Whiteknights,
 PO Box 217, Reading, RG6 6AH**

Section 2 Expression of wish

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

Beneficiary 1

2.11 Name	_____
2.12 Address	_____
2.13 Relationship	_____
2.14 Proportion	_____

Beneficiary 3

2.31 Name	_____
2.32 Address	_____
2.33 Relationship	_____
2.34 Proportion	_____

Beneficiary 2

2.21 Name	_____
2.22 Address	_____
2.23 Relationship	_____
2.24 Proportion	_____

Beneficiary 4

2.41 Name	_____
2.42 Address	_____
2.43 Relationship	_____
2.44 Proportion	_____

Section 3 Confirmation

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.

3.1 Signature of member

Signature	_____
Date	_____

Special notes

Note 1

Under present law, lump sum death benefits under the Scheme can be paid at the discretion of the Trustees direct to your beneficiaries without any tax liability. Your beneficiaries are defined in the Scheme 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, or the Trustees of any other occupational pension scheme operated by the University.

Note 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 the Trustees.

Note 3

You can change your nomination whenever you want, and you should always keep your expression of wish form up to date.

Note 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%.

Note 5

Your nomination will be treated as confidential.