

Expression of Wishes for Successor Beneficiary

- For a beneficiary to name successors who they would like to receive benefits from a pension scheme when they die.
- This form should be completed and signed by the beneficiary.

1. Pension Scheme Details

Pension Scheme Name

Principal Employer's Name

Adviser's Name

Adviser's Company Name

Adviser's Company Address

2. Beneficiary's Details

Title

Mr

Mrs

Ms

Miss

Dr

Other

Forename(s)

Surname

Permanent Residential Address

Gender

Male

Female

Date of Birth

National Insurance Number

3. Expression of Wishes

In the event of your death while a beneficiary of the Scheme, please confirm the percentage split of any lump sum and/or pension benefits payable to your nominated successor beneficiaries.

Name	Address	Relationship	Share
			%
			%
			%
			%
			%
			%
			%

Note: Please note that the Trustees will consider your wishes but shall not necessarily be bound by them. If you do not nominate successor beneficiaries, the Trustees will exercise their full discretion as to whom your benefits should be paid. This may include payment to your estate. We will keep this information confidential.

Note: Please use additional sheets if you wish to appoint additional successor beneficiaries.

Note: You can change your nomination at any time by completing a new Nomination of Successor Beneficiary Form obtainable from us.

4. Declaration

I wish the beneficiary(ies) named above to receive benefits from the Scheme Fund on my death. I understand that this is an expression of wishes and the Trustees are not bound by this appointment. I understand that I may change my nomination by informing you in writing at any time.

5. Signature

Print Name

Signature

Beneficiary

Date

Please correspond with us



enquiries@whitehallgroup.co.uk



**Whitehall Group (UK) Ltd
8-10 Bolton Street
Ramsbottom
BLO 9HX**



03302 232300

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Whitehall Group (UK) Limited, a company registered in England and Wales (Registered number 07625300), Whitehall Trustees Limited, a company registered in England and Wales (Registered number 07625294) and Whitehall Corporate Limited, a company registered in England and Wales (Registered number 7759590). All three companies have their registered office at 8-10 Bolton Street, Ramsbottom, BLO 9HX.

