

For customers

Death benefits nomination form

Please read these notes before completing this form.

You should complete this form to indicate how you'd like any lump sum benefit paid on your death. Although Scottish Equitable plc, as a scheme administrator, may take your wishes into account, under the rules of the Scheme the final choice rests with the scheme administrator.

The scheme administrator must have received your nomination before the date of your death in order for your wishes to be taken into account.

This form applies to:

- the Scottish Equitable Personal Pension Scheme; or
- the Scottish Equitable Self-administered Personal Pension Scheme, or
- the Scottish Equitable Stakeholder Scheme.

Your nomination will apply to all your plans held under the same scheme. If you have plans under more than one of these schemes you should complete a separate form for each scheme. If you're unsure what scheme your plan belongs to please check your policy schedule or contact us.

This nomination cancels any previous nomination you've made (and any later nomination you make will cancel the previous one).

It may also be a good idea to review your nomination(s) from time to time, so it accurately reflects your wishes and takes into account any change in your circumstances.

Please make sure you name all individuals, trusts and/or charities you'd like to receive a lump sum.

The use of 'I' or 'me' throughout this form refers to the policyholder details given in section 1.

You can also complete this form at any time online at [aegon.co.uk/onlineform](https://www.aegon.co.uk/onlineform) (if you wish to nominate a charity this can only be done using this paper form).

Former protected rights

If you have former protected rights, from contracting-out of the State schemes, and made an irrevocable direction (an instruction that's legally binding) in respect of these benefits before 6 April 2012, this direction must continue. If any direction you made in respect of former protected rights before 6 April 2012 was revocable (legally capable of changing) you can remove the direction at any time. If you do remove such a direction from former protected rights, these benefits will then be treated in the same way as other lump sum death benefits.

If your personal circumstances mean you need any additional support, or if you'd like a large print, Braille or audio version of this document, please visit [aegon.co.uk/additionalsupport](https://www.aegon.co.uk/additionalsupport) or call 03456 10 00 10 (call charges will vary).

1. Your details

**Please complete in BLOCK CAPITALS
and ballpoint pen.**

Title

Full forename(s)

Surname

Email address

Contact phone number

We'll only use your email address and
phone number to contact you about this
instruction.

Plan number(s)

The plan number is for reference only, as
your nomination applies for all of your
plans in the relevant scheme.

National Insurance number (you'll find your
National Insurance (NI) number on your
payslip and/or tax code notice). If you can't
provide an NI number please call us on the
number listed above.

2. Details of beneficiaries

I'd like the scheme administrator to pay any lump sum death benefit (including return of fund) to a trust as detailed in section 2.1 and/or the charities named in section 2.2, and/or the beneficiaries named in section 2.3, in the proportions set out below.

The percentage of benefits across individual, trust and charity beneficiaries must add up to 100%.

If you exceed the limit of boxes in this form and would like to include any nominations in addition to those below please include these on a separate piece of paper, signed and dated and send it to us along with this form.

2.1 Trust details

If you wish to nominate a trust you must send us a certified copy of your trust documents and include a main and second contact below for the trust.

Name of trust (if any)

Date of trust (dd/mm/yyyy)

Percentage of benefits to the trust

Name of trustee(s)	Address (including postcode)

2. Details of beneficiaries – continued

2.2 Charity details

Name of charity

Charity number

Date of registration

Percentage of benefits to the charity

Name of charity

Charity number

Date of registration

Percentage of benefits to the charity

Name of charity

Charity number

Date of registration

Percentage of benefits to the charity

Name of charity

Charity number

Date of registration

Percentage of benefits to the charity

Name of charity

Charity number

Date of registration

Percentage of benefits to the charity

Name of charity

Charity number

Date of registration

Percentage of benefits to the charity

2. Details of beneficiaries – continued

2.3 Details of beneficiaries

Full forename(s)

Surname

Address

Postcode

Relationship to me

Percentage of benefits

 %

Full forename(s)

Surname

Address

Postcode

Relationship to me

Percentage of benefits

 %

Full forename(s)

Surname

Address

Postcode

Relationship to me

Percentage of benefits

 %

Full forename(s)

Surname

Address

Postcode

Relationship to me

Percentage of benefits

 %

2. Details of beneficiaries – continued

Full forename(s)

Surname

Address

Postcode

Relationship to me

Percentage of benefits

 %

Full forename(s)

Surname

Address

Postcode

Relationship to me

Percentage of benefits

 %

3. Declaration

I acknowledge the scheme administrator of the scheme has absolute discretion as to which of the beneficiaries, if any, it chooses.

I acknowledge this nomination cancels any and all previous nominations I've given.

I agree that I have appropriate consent from the other individuals I've named above to give their details in this form.

I'm aware that the scheme administrator can only take into account nominations received before I die. If I complete a death benefit nomination form but die before the scheme administrator receives it, the scheme administrator won't take it into account when choosing beneficiaries.

Date (dd/mm/yyyy)

Signature

Only nominations received by us will be taken into account. We'll send you confirmation of your nomination(s) by post once we have received this form. If you don't receive this confirmation please contact us to check that we received it.

If you need to get in touch with us about this request or for help with anything else, please contact us on 03456 10 00 10 (call charges will vary).

You can also complete this form any time online at aegon.co.uk/onlineform (if you wish to nominate a charity this can only be done using this paper form).

Alternatively, you can send this back by post. If this nomination is for your **individual pension plan**, please return the completed form to:

Individual Pensions Servicing
Customer Services
Aegon and Scottish
Equitable Pensions and Bonds
Sunderland
SR43 4DS

If this nomination is for your **group pension plan**, please return the completed form to:

Group Pensions Servicing
Customer Services
Aegon and Scottish Equitable
Pensions and Bonds
Sunderland
SR43 4DS

Remember to include any additional information requested throughout this form.