



# FENNER LIFE ASSURANCE

## Expression of Wish Form

Death benefits from the life assurance cover provided by Fenner are paid at the discretion of the Trustee, although you may indicate who you wish them to be paid to by completing an Expression of Wish form. The purpose of this form is to allow you to record who you would like the Trustee to consider for the receipt of any benefits payable from your life assurance cover in the event of your death.

Please return this form to your local HR or pensions contact. We suggest that you keep a copy of the completed form for your records.

Please note: **this applies to life assurance cover only**; if you are a member of the Fenner Retirement Plan, you will also need to fill out an expression of wish form with regard to your benefits accrued under the Plan. The form is available in the customer area of the Standard Life website which you can access by logging in at [www.standardlifepensions.com/fenner](http://www.standardlifepensions.com/fenner). Alternatively, your local HR or pensions contact can provide you with a copy.

### Personal details

Full name (capital letters):

Date of birth:  N.I. number:

In the event of my death I would like the Trustee to consider paying any lump sum to the following person(s), in the proportion(s) shown:

Full name (capital letters):

Home address:

Relationship:  Post code:

Proportion %:

Full name (capital letters):

Home address:

Relationship:  Post code:

Proportion %:

Full name (capital letters):

Home address:

Relationship:  Post code:

Proportion %:

A separate page may be attached if you wish to split the proportions further.

I understand that this Expression of Wish form is not binding on the Trustee and that the Trustee has total discretion in applying any lump sum benefits. I consent, for the purposes of the Data Protection Act 1998, to the above information being held and processed by, or on behalf of, the Trustee.

Signature:  Date:

Note: The Trustee may take your wishes into account but are not bound by them (thereby allowing it to take account of any change in your circumstances after the date of this form). Paying lump sums in this way means that they are not normally subject to Inheritance Tax.