

Instruction for payment of the lump sum death benefit

Filling in this form

The Trustee decides who should receive the lump sum death benefit which is payable if you die before taking the proceeds of your fund. You can help by using this form to tell the Trustee who you would like to receive the benefit. This means that the benefit can be paid promptly and will not normally be liable to Inheritance Tax. But you should understand that although the Trustee will take your wishes into consideration, they must consider all your circumstances.

The Trustee will keep the contents of this form confidential.

Please use BLOCK CAPITALS to fill in this form. Do not use correction fluid if you make a mistake. If you need to correct a mistake, please initial any changes you make.

PLD21MT 0812

Pitmans Trustees Limited are the Trustee of the plan

Part 1 - Your personal details

Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)	Surname
Forenames (in full)	
Name of Scheme	
Your membership number TM	

Your membership number is preceded by the letters 'TM'. You can find it on your Certificate of Membership or on letters we have sent you.

Part 2 - Details of the person(s) you would like the lump sum death benefit paid to

Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)	Surname
Forenames (in full)	National Insurance Number
Address	
Postcode	
Relationship to you	%
Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)	Surname
Forenames (in full)	National Insurance Number
Address	
Postcode	
Relationship to you	%
Title (Mr/Mrs/Miss/Ms/Other eg Dr/Rev)	Surname
Forenames (in full)	National Insurance Number
Address	
Postcode	
Relationship to you	%
Total	
100 %	

Before you complete Part 2, please read the Notes on the back of this form. They explain who you can choose to receive the lump sum death benefit.

Please ensure that the amounts you allocate total 100%.

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If you want to choose more than three people, please write their details on a separate sheet and attach it to this form.

Please ensure that the amounts you allocate total 100%.

Part 3 - Notes

The rules of the plan allow the Trustee to pay the lump sum death benefit to a number of people including:

- your family members
- anyone who receives a regular payment from you or is wholly or partly dependent on you
- anybody cohabiting with you as if they were married to you (regardless of their sex) provided their finances are interdependent with yours
- any person named in your will or nominated by you as a potential beneficiary
- your legal personal representatives.

Family members include your husband/wife/civil partner, your children (including adopted children), grandparents, parents, brothers, sisters, uncles, aunts, nephews, nieces, cousins and grandchildren.

Part 4 - Death on or after age 75

A tax charge will normally apply to a lump sum death benefit payable if you die on or after age 75.

You can also ask the Trustee to pay some or all of the lump sum to a charity. If the Trustee then decides to pay the lump sum to your nominated charity and you die with no surviving dependants, it will normally be paid tax free. If you wish to nominate a charity, please complete the details below.

Name of Charity	
Address	
	Post code
Registration number	%

Part 5 - Lifetime allowance charge

A charge called the 'Lifetime Allowance charge' may be payable if the total of your lump sum death benefits from all schemes exceeds an amount set by the Revenue. Your financial adviser will be able to provide you with the details.

Part 6 - Authorisation

I wish my lump sum death benefit to be paid to or for the benefit of the person(s) named in Part 2 and/or the charity, if any, named in Part 4.

Signature	Date (DD/MM/YYYY)
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What happens next

Send this form for the attention of the Trustee, c/o Standard Life, Standard Life House, 30 Lothian Road, Edinburgh EH1 2DH

Please keep a copy of it for your files in case you want to change your instructions.

If your circumstances change and you do want to alter your instructions, complete a new form and send it to the Trustee.