

## Payment of death benefits

### Expression of Member's Wish

### Master Trust/Group Plan (CIMP)/

### Executive Pension Plan/Stanplan D/ Trust Based Pension

#### Filling in this form

The scheme trustee(s) or, in some circumstances, your employer will decide who should receive the death benefit which is payable if you die before taking the proceeds of your fund. You can help them by using this form to tell them 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 they will take your wishes into consideration they must consider all your circumstances.

They 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.**

**PLD21 0126**

Note A in Part 3 explains who makes the decision.

#### Part 1 – Your personal details

Title (Mr/Mrs/Miss/Ms/ Other eg Dr/Rev)	<input type="text"/>
Surname	<input type="text"/>
First name(s) in full	<input type="text"/>
<b>Address</b>	
House number	<input type="text"/>
Street	<input type="text"/>
City/Town	<input type="text"/>
County	<input type="text"/> Postcode <input type="text"/>
Date of birth (DD/MM/YYYY)	<input type="text"/>
National Insurance Number	<input type="text"/>
Name of Scheme	<input type="text"/>
Your membership number	<input type="text"/>

Your membership number will start with the letter(s) 'G', 'H' or 'TM'. You can find it on your Certificate of Membership, Acceptance or on letters we have sent you.

## Part 2 – Details of the person(s) you would like the death benefit paid to

Title  
(Mr/Mrs/Miss/Ms/  
Other eg Dr/Rev)

Surname

First name(s)  
in full

**Address**

House  
number

Street

City/Town

County  Postcode

Date of birth  
(DD/MM/YYYY)

Relationship  
to you  Proportion  %

Please ensure that the amounts you allocate total 100%.

Title  
(Mr/Mrs/Miss/Ms/  
Other eg Dr/Rev)

Surname

First name(s)  
in full

**Address**

House  
number

Street

City/Town

County  Postcode

Date of birth  
(DD/MM/YYYY)

Relationship  
to you  Proportion  %

Please ensure that the amounts you allocate total 100%.



## Part 3 – Notes

### A. Who makes the decision?

If you belong to a Master Trust or a Trust Based Pension scheme, the trustee will decide who to pay the death benefits to.

If you belong to a Group Plan or an Executive Pension Plan and are still employed by the scheme employer when you die, they will normally decide who to pay the death benefits to. But if you have stopped working for them before you die, the scheme trustee(s) will decide.

If you belong to a Stanplan D scheme, the scheme employer will normally decide.

### B. Tax charges

If you die before age 75, your beneficiaries do not normally have to pay income tax on benefits they receive. Any lump sum in excess of your lump sum and death benefit allowance will be subject to income tax at the beneficiary's marginal rate.

If you die aged 75 or over, any lump sum or income benefits will be paid subject to income tax at your beneficiary's marginal rate.

## Part 4 – Authorisation

I wish the death benefit to be paid to or for the benefit of the person(s) named in Part 2.

Signature



Date  
(DD/MM/YYYY)



Signature required.

## What happens next

Send this form to: Workplace Pensions, 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 above address.