

TPT Retirement Solutions

Nomination form

Please complete all relevant sections and return to TPT Retirement Solutions.

Who will receive your benefits should you die before retirement?

Member declaration

Full name of member:

Address:

..... Postcode:

Email:

Telephone number:

Membership number (if known): **M**

National Insurance number:

I confirm that these are my wishes at the date below, and that if my circumstances change I will advise TPT of this.

Signed: Date:

1 | Payment of lump sum death benefits

Please provide details below of the person(s) you wish to receive the lump sum benefit in the event of your death. There is no limit to the number of beneficiaries (see notes overleaf). If you wish to share the lump sum between more than three people, please use an extra sheet. Please ensure the total adds up to 100%.

Full name: Relationship:
Date of birth: Proportion: %
Address:
..... Postcode:

Full name: Relationship:
Date of birth: Proportion: %
Address:
..... Postcode:

Full name: Relationship:
Date of birth: Proportion: %
Address:
..... Postcode:

2 | Provision of survivor's pension

If you are a member of one of the following schemes, a pension is payable to your legal spouse or civil partner only:

Frank Roberts & Sons Pension Scheme

PCHA 2001 Pension Scheme

The Together Trust Final Salary Scheme

The United Reform Church Final Salary Scheme

Additionally, if you only have defined contribution (DC) benefits, you do not need to complete this section.

The provision of a survivor's pension is conditional on the Scheme providing and/or you having chosen to provide this benefit. If you are in any doubt as to whether this benefit applies to you please contact TPT Retirement solutions for further information

In the event of your death, a pension may be provided to your survivor, payable for the rest of his or her life. The notes overleaf explain your choice and who can receive the benefit.

Please note: Your nomination for the survivor's pension (but not the lump sum death benefit) will be automatically revoked by your later marriage, civil partnership, divorce or dissolution of a civil partnership. You should ensure that you complete a new nomination in these circumstances, particularly if you wish this nomination to stand.

Please indicate below who is to receive the survivor's pension on your death.

Full name:

Relationship: Date of birth:

Address:

..... Postcode:

Notes on death benefits

1. Lump sum death benefit

- (a) You may nominate any one or more persons or organisations to receive this. You must use the name of a person or organisation and not your 'Estate' or the title 'Executor' or 'Administrator'.
- (b) Any nomination will be revoked automatically by the death of the person(s) nominated.
- (c) You may change your nomination at any time. Please obtain a further form from tpt.org.uk if you wish to do so.
- (d) The Trustee has discretion over who is to receive the benefit and, in exceptional circumstances, where no information is available, reserves the right to retain all or part of the value of the benefit within the assets of the Scheme.

2. Survivor's pension

- (a) You do not have to nominate anyone now. If you wish to do so later or you wish to change your nomination, please contact TPT.
- (b) You may only nominate one person. This pension cannot be shared except in the circumstances of the following paragraph.
- (c) If you were a member of the scheme prior to 6 April 2016 an amount equivalent to the Widow(er)'s Guaranteed Minimum Pension (GMP) (if any) and Reference Scheme Widow(er)'s Pension must be paid to a legal spouse or civil partner. Therefore, if you are legally married or have a legal civil partner you can allocate only the excess to someone other than your legal spouse or civil partner.
- (d) Any nomination will be revoked automatically by the death of the person nominated, or by your later marriage, civil partnership, divorce or dissolution of a civil partnership. If you wish your original nomination to stand you must confirm this in writing to TPT.
- (e) As the choice of beneficiary has widened to the maximum permitted extent, it is important for you to exercise your right to nominate wherever possible. Eligibility will have to be confirmed before payment commences.
- (f) If on your death there is no valid nomination, TPT has discretion to pay the benefits to any eligible beneficiary but has the right to retain all or part of the benefit within the Scheme.

3. Who can receive the survivor's pension?

- (a) Your spouse or civil partner.
- (b) You may nominate a child (of any age) who is dependent on you, and disabled and is unable to earn a living (in this case the child would be paid the survivor's pension, but not the child's pension).
- (d) You may nominate a child to receive the survivor's pension only up to the date he or she ceases to be treated as a 'Child' as described in the Trust Deed and Rules (in this case the child would be paid the survivor's pension, but not the child's pension).
- (d) A partner who lives with you and shares the living expenses, or who is largely financially dependent on you.

A pension will only be payable to a person who is eligible under the Rules of the Scheme at the time of your death. The Trustee's decision on a person's eligibility for a survivor's pension is final. If you are in any doubt as to whether a person will be eligible please contact TPT Retirement solutions for further information