

# COMPANY PENSION TRANSFER PLAN

## STANDARD TRUST NOMINATION OF BENEFICIARY FORM

If your Company Pension Transfer Plan was set up before February 2006, the Standard Trust set out in section 9 of the Company Pension Transfer Plan Technical Guide applies for the payment of lump sum death benefits where you have not set up a separate individual trust. Under the terms of the Standard Trust, Prudential Corporate Pensions Trustees Limited (Prudential) will have discretion on the distribution of the death benefit, except for funds resulting from contracting-out where your selection is binding on Prudential.

Prudential cannot be compelled to follow any wishes that you set out here. However, we want you to tell us the details of how you would prefer any death payments to be distributed, so your wishes are clear.

The Standard Trust may not avoid liability to inheritance tax, unless the lump sum death benefit is paid to your spouse or civil partner. A separate individual trust is required in order to avoid inheritance tax if the lump sum death benefit is paid to other beneficiaries. Please contact us if you require further information.

**Please complete in CAPITAL LETTERS using black ink.**

### A – YOUR DETAILS

Full Forenames

Surname

National Insurance Number

Company Pension Transfer Plan Number

To Prudential: Please

- consider the following as possible recipients of any lump sum death benefits which are payable from the Company Pension Transfer Plan at your discretion on my death; and
- arrange for payment of any contracted-out benefits to the following recipients unless legislation dictates otherwise.

I understand that, in exercising your discretion, you will not be bound in any way by my wishes, but I would like you to bear them in mind.

### B – BENEFICIARIES' DETAILS

Full Name and Address (include postcode)

Postcode

Relationship (if any)

Proportion of Total Benefit

 %

Full Name and Address (include postcode)

Postcode

Relationship (if any)

Proportion of Total Benefit

 %

## B – BENEFICIARIES' DETAILS – CONTINUED

Full Name and Address (include postcode)

Postcode

Relationship (if any)

Proportion of Total Benefit

 %

Details of any additional nominations should be included on a separate sheet.

Separate sheet attached (tick box)

**PLEASE ENSURE THAT YOU HAVE ALLOCATED A TOTAL OF 100% OF THE BENEFIT FROM YOUR COMPANY PENSION TRANSFER PLAN.**

## C – YOUR SIGNATURE

This request cancels any I have made previously on this matter. When supplying information relating to other living individuals, I agree that I have the consent of these individuals to supply that information, and for Prudential to process the information.

Signed by the Planholder

Date

D	D	M	M	Y	Y	Y	Y
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**IF YOU WISH TO ALTER DETAILS AT ANY TIME IN THE FUTURE, PLEASE CONTACT PRUDENTIAL.**

# PRUDENTIAL