

Nomination form

Please use BLOCK CAPITAL letters

As a member of the Railways Pension Scheme, a lump-sum death benefit may be paid if you die.

You can use this form to avoid your dependants (or beneficiaries) having to pay inheritance tax (under current law) on the lump-sum death benefit, and sometimes speed up the payment of benefits by asking the Trustee Company to pay the lump sum to a named person. If you do not fill in this form, your lump-sum death benefit will be paid to the personal representative of your estate. This is the person who is legally responsible for sharing out your property and belongings after you die.

The Trustee Company does not have to follow your wishes, but it will take them into account and look at your personal circumstances at the time you die. It will then decide who will receive the benefits.

You can change your choice of person by filling in another form. But once you have given the Trustee Company the power to pay your benefits, you cannot take it back.

Your full name:

Your home address
and postcode:

Your pension
reference number:

Your date of birth:

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Important information about your nominations

If I die, I want the Trustee Company to pay any lump-sum death benefit to the following people in the percentages shown on page 2.

I understand that the Trustee Company does not have to do as I ask, and that I can change the people I have chosen at any time by sending you another form.

Although the form allows space for up to three people, you can put forward the names of any number of people. If you want to put forward more people, please list them on a separate sheet of paper. These should also be witnessed and signed.

If you are nominating a child under age 18, an adult must receive your lump-sum death benefit on their behalf if they are still under 18 at the time of your death. You should provide the name and address of the adult who will act for the child by using an extra sheet of paper.

(Continued on page 2.)

Your nominations

The people I want to receive my lump-sum death benefit are as follows.

1 Full name:

Address and
postcode:

Percentage of the benefit I want them to receive:

 %

Relationship to me:

2 Full name:

Address and
postcode:

Percentage of the benefit I want them to receive:

 %

Relationship to me:

3 Full name:

Address and
postcode:

Percentage of the benefit I want them to receive:

 %

Relationship to me:

Remember, if you want to put forward more people, please list them on a separate sheet of paper.

Your confirmation

I confirm that the Trustee Company has the power to pay any lump-sum death benefit to a named person if I die. I understand that once I have given the Trustee Company the power to pay my benefits, I cannot take it back.

Your signature:

Date:

You should always keep your nominations up to date. If you want to change previous nominations, please fill in another nomination form.

Your witness

I confirm that I witnessed the member named on page one fill in this form and that I am not a relative or potential beneficiary named on this form.

Full name:

Address and
postcode:

Signature:

Date:

Checklist



Before you send us this form, please use this checklist to make sure you have filled it in properly.

- If you have nominated more than one person, do the percentages add up to 100%?
- Have you signed and dated the form?
- Has your witness signed and dated the form?
- Have you made sure that your witness is not a relative or a potential beneficiary named on the form?
- If you have nominated someone under age 18, have you provided on a separate sheet of paper details of someone who will receive your lump-sum death benefit on their behalf?



When you have filled in and checked all parts of this form, send it to:

The Trustee Company of the Railways Pension Scheme
PO Box 300
Darlington
DL3 6YJ.

Important note:

Your wishes are not valid unless you get an acknowledgement from us. If you do not receive an acknowledgement within 28 days, please contact the Trustee Company immediately at the address shown above, or ring 0800 2 343434.

Data Protection

We, the Railways Pension Trustee Company Limited and Railway Pensions Management Limited (Pensions Management), will use the personal details provided to deal with and pay any death benefits the member named on the form may have. We will only release the personal information provided on this form to our service providers and agents for these purposes. We may release personal information if we have to do so by law. By signing and returning this form, you agree to us using the information you give us for these purposes.

Please contact the Data Protection Officer at Pensions Management if you want to raise any issues in relation to data protection. If you pay a fee, you can ask the Data Protection Officer for a copy of the information about you that we hold in our records.

