



ALTERNATIVELY SECURED PENSION - LETTER OF INSTRUCTION

PENSION SCHEME NAME:

MEMBER NAME:

I wish to instruct the Trustees/Administrator that, on the event of my death, my remaining fund must be redistributed in accordance with the following instructions:-

FIRSTLY - SPOUSE'S / DEPENDANT'S PENSION

<u>Full Name</u>	<u>Relationship</u>	<u>Percentage of Fund</u>

SECONDLY - ON DEATH OF THE SPOUSE / DEPENDANT:

a) **EITHER** A CHARITY LUMP SUM DEATH BENEFIT TO THE FOLLOWING REGISTERED CHARITY(IES):

<u>Full Name</u>	<u>% of Benefit</u>

b) **OR** A TRANSFER LUMP SUM DEATH BENEFIT TO THE FOLLOWING INDIVIDUALS OR MEMBERS OF THE PENSION SCHEME:

<u>Full Name</u>	<u>Relationship</u>	<u>Percentage of Fund</u>

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Signed: Date:

Note:

- i. This instruction replaces all previous nominations.
- ii. The Trustees/Administrator must be bound by these instructions expressed in writing by me even where they involve making an unauthorised payment in accordance with the Finance Act 2004.
- iii. If you leave the above space blank or fail to return the form funds will be redistributed to the other scheme members or paid to a charity subject to the discretion of the Scheme Administrator.
- iv. A dependants pension is normally only payable to your spouse, a financially dependent adult or children whilst under 23 or dependent due to physical or mental impairment.
- v. It is possible to nominate a combination of Charity Lump Sum Death Benefit and Transfer Lump Sum Death Benefit.