

Nomination of beneficiaries

Zurich Self Invested Personal Pension Zurich Protected Rights Transfer Plan

By completing and returning this form, you can inform the Trustee (Zurich Pension Trustees Limited) about any changes in how you wish any death benefits to be paid, in accordance with the Trust Deed and Rules of the Scheme.

Please note that although your nomination will be given due consideration it is not binding and the Trustee will have discretion to decide how any death benefit is distributed.

You can change or cancel your nomination at any time.

You should consider what you wish to happen if the beneficiary (or one of the beneficiaries) dies before you, for example 'my husband/wife but if he/she dies before me, to all my children who are living at the time of my death, in equal shares.' Please write any instruction like this in the 'Further instructions' box.

You should review your nomination from time to time and when there is a change in your personal circumstances.

If you are taking drawdown pension, you should nominate one or more surviving beneficiaries if you wish to give them the choice of how to take drawdown pension benefits (i.e. a lump sum subject to tax, drawdown pension or an annuity).

Please complete all sections of this form that apply to you in BLOCK CAPITALS.

Your details

First name(s)

Surname

Plan number

Self Invested Personal Pension

Details of beneficiaries

Full Name	Address	Relationship	Nationality	% share

Further instructions

Protected Rights Transfer Plan

Details of beneficiaries

Full Name	Address	Relationship	Nationality	% share

Further instructions

Authorisation

In the event of my death, I wish the Trustee to consider paying the beneficiaries above in the proportion(s) indicated. This form replaces any earlier 'Nomination of beneficiaries' form I may have completed for this plan.

Signature(s) of investor(s)

Date

D

D

M

M

Y

Y

Y

Y

Please contact us or your adviser if you would like this in large print, Braille or on audio tape or CD.

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