Nomination of death benefit for the Nucleus APP account

Please complete and sign before forwarding to us at the address below.

Nucleus client relations, PO BOX 26968, Glasgow G2 9DY

If any party signs but fails to date a signature, the date that we receive this withdrawal form will be deemed to be the date that the signing party signed the agreement.

If we don't have a nomination on file for you, it may take longer to settle any pension death benefits to your beneficiaries. You can amend your choice at any point. Your expression of wishes will remain in force until you notify us, in writing, of any changes you wish to make.

Please note death benefits are distributed as a lump sum payment to nominees (they cannot be paid out as a pension to nominees). Nominees also have the option of transferring part or all of the death benefits to another pension arrangement (rather than take a lump sum payment).

Client name

Account number

N

Pension death benefit to be paid to an individual(s)

Tax may be payable by the beneficiary if you are over 75 when you die. Please speak to your adviser for more information on which payment type may be best suited based on your individual circumstances. You should review this nomination regularly to ensure it reflects any changes to your wishes.

I wish the Scheme Administrator to pay any pension death benefits to the beneficiaries and in the proportions as follows:

Beneficiary

Address

Relationship

Date of birth

Percentage payable to beneficiary %

Beneficiary

Address

Relationship

Date of birth

Percentage payable to beneficiary %

Beneficiary

Address

Relationship

Date of birth

Percentage payable to beneficiary %

Nomination of death benefit for the Nucleus APP account (continued)

Beneficiary

Address

Relationship

Date of birth

Percentage payable to beneficiary %

Beneficiary

Address

Relationship

Date of birth

Percentage payable to beneficiary %

Beneficiary

Address

Relationship

Date of birth

Percentage payable to beneficiary %

Special instructions

If you have any special instructions in relation to payment of pension death benefits please detail below: e.g. on death of dependant please pay residual balance as a lump sum to…charity of my choice…

- I accept that this nomination is only an expression of my wishes.
- I understand that whilst the scheme administrator will pay due consideration to those wishes they have absolute discretion as to beneficiaries and to the proportion of benefits paid to each beneficiary.
- I understand that I can change this nomination at any time and that the scheme administrator will refer to the latest completed form held.

Signed

Date

For literature in alternative formats, such as Braille, large print, audio or E-text, please call us on 0131 226 9535, or via the Relay UK service on 18001 0131 226 9535.

0131 226 9535 client.relations@nucleusfinancial.com nucleusfinancial.com

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