



Nomination of death benefit for the Nucleus pension

Once this form has been completed and signed, please send it to us at the below address.

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

 If anyone forgets to add a date to their signature, we'll treat the day we receive this form as the signing date.

 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 in time. Your expression of wishes will remain in force until you notify us, in writing, of any changes you wish to make.

 Please note that pension death benefits can be distributed as lump sum payment(s) or as an income for a nominee, or a combination of both.

Client name

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.

Client reference number (s)

When you nominate a beneficiary for your pension death benefits, that nomination is recorded at the scheme level, not per individual pension account.

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

Beneficiary

Relationship

Address

Date of birth

Percentage payable to beneficiary %

Beneficiary

Relationship

Address

Date of birth

Percentage payable to beneficiary %

Nomination of death benefit for the Nucleus pension - continued



Beneficiary	Relationship	
Address	Date of birth	
	Percentage payable to beneficiary	%
Beneficiary	Relationship	
Address	Date of birth	
	Percentage payable to beneficiary	%
Beneficiary	Relationship	
Address	Date of birth	
	Percentage payable to beneficiary	%
Beneficiary	Relationship	
Address	Date of birth	
	Percentage payable to beneficiary	%

I would like the scheme administrator to consider paying the death benefits to a trust and enclose a certified copy of the trust deed with my application*.

Name of Trust

*option not available for the Nucleus APP. Please refer to:

[Nomination of death benefits for the Nucleus APP form \(0281\)](#)

I understand that if the scheme administrator chooses a beneficiary who is not named in this expression of wishes, drawdown income would normally only be available in limited circumstances. Therefore in order to allow the scheme administrator to pay drawdown income to as wide a range of beneficiaries as possible and for the purposes of the relevant tax legislation, I nominate any individual who is eligible to receive a lump sum on my death under the rules of the scheme.

This expression of wishes is not binding on the scheme administrator but will help it when considering who is to receive benefits upon your death.

Nomination of death benefit for the Nucleus pension - continued



Special instructions

If you have any special instructions in relation to payment of pension death benefits please detail these below:

e.g. on death of dependant please pay residual balance as a lump sum to ...charity of my choice...

- I accept that the nominations above are 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.
- I understand that if the scheme administrator chooses a beneficiary who has not been named above, drawdown income would normally only be available in limited circumstances. Therefore, in order to allow the scheme administrator to pay drawdown income to as wide a range of beneficiaries as possible and for the purposes of the relevant tax legislation, I nominate any individual who is eligible to receive a lump sum on my death under the rules of the scheme.

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 Typetalk service on 18001 0131 226 9535.



0131 226 9535



client.relations@nucleusfinancial.com



www.nucleusfinancial.com