

ScottishPower Pension Scheme

**Nomination for Lump Sum Life Assurance Benefit**

Before completing this form, please read the Member Guide, available on [www.sppensions.com](http://www.sppensions.com)

Please use **BLOCK CAPITALS** to complete the form but before doing so, **read the notes** on the back of this form. Please send the form to the Scheme Administrator (see below).

To: **The Trustee of the ScottishPower Pension Scheme**

**Surname**

**Mr/Mrs/Miss/Ms**

**First name(s)**

**Payroll Number**

**Location**

**National Insurance Number**

In the event of my death I would like the Trustee to consider distributing any lump sum death benefit that may become

payable as follows (total proportion must sum to 100%):

**One**

**Name**

**Two**

**Name**

**Address**

**Address**

**Relationship**

**Relationship**

**Proportion**

**Proportion**

**Three**

**Name**

**Four**

**Name**

**Address**

**Address**

**Relationship**

**Relationship**

**Proportion**

**Proportion**

I understand that the nomination is only an expression of my wishes and is not binding on the Trustee and that I may submit

a new Nomination Form at any time to replace this one should my personal circumstances change.

I authorise the Trustee, Scheme Administrator and the Company to hold and process my personal data and sensitive personal data and the data I have provided about my dependants and beneficiaries in accordance with current data protection legislation, for the purpose of running the Scheme and for the purpose of determining the recipients of and administering any benefits payable to me and on my death.

**Signed**

**Dated**

Please post original signed version of this form to the Scheme Administrator below:

Mercer Limited

McLaren House

Talbot Road

Stretford

Manchester

M32 0FP or upload it to ContactMercerAdmin at www.contact.mercer.com/green

**4.**

**5.**

**7.**

**6.**

**3.**

**2.**



**Notes**

**1.**

Under present law, any lump sum death benefits payable under the Scheme at the discretion of the Trustee direct

to your beneficiaries can be paid without any tax liability. Your beneficiaries are defined in the Scheme Rules or other official document governing the Scheme and may include your family, other relatives, dependants and any person or organisation (e.g. a charity) you Nominate in writing to the Trustee.

You should tell the Trustee who you wish to be treated as your beneficiaries filling in the form overleaf. If you do not complete this form, the Trustee will allocate benefits in their absolute discretion and those people you would wish to benefit may not receive any benefits.

You should always keep your nominations up to date following any changes in your personal circumstances. You can change any of your nominations whenever you want. To do this you should complete a new Nomination Form that can be obtained from the Scheme Administrator or **the HR Intranet**. (Reward/Pensions area).

Although the form allows space for up to 4 nominations, there is no restriction on the number of people and/or organisations you can nominate. Please specify your nominations in a letter to the Trustee if the form does not meet your needs. It is important to state for each nominated beneficiary what proportion of the total lump sum you wish him or her to receive. **Please make sure the proportions add up to 100%.**

The Trustee will give every consideration to your wishes before paying any lump sums on death; however, to ensure that the payment can be made without any UK tax liability arising, your nomination is not legally binding on the Trustee.

If you joined the Scheme prior to **1 January 1990**, to enable the lump sum life assurance benefit to be payable at the discretion of the Trustee, you need to have completed a Notice of Direction. If you have not already done so, a Notice of Direction can be obtained from the Scheme Administrator for completion and return.

The information you provide will be used for the purpose of administering benefits under the Scheme. It will be held, in strict confidence, by the Scheme Administrator on behalf of the Trustee.