

Expression of Wish – Beneficiary / Nominee

Print Full Name:	<input type="text"/>	National Insurance No:	<input type="text"/>
Employer Name:	<input type="text"/>	Date of Birth:	<input type="text"/>
Member Signature:	<input type="text"/>	Date:	<input type="text"/>

As a member of the Carey Workplace Pension Trust, I confirm that in the event of my death I instruct Carey Corporate Trustees UK Limited (the Trustees) to pay out the benefits of my arrangement to my beneficiaries as detailed below.

I accept that these instructions will remain in force until such time the Trustees receive a revised signed instruction from me.

I accept that the Expression of Wish is not binding on the Trustees, but that the Trustees will take it into account when exercising their discretion as to the payment of any death benefit.

I accept that it is my responsibility to inform the Scheme Administrator and Trustees of any changes to my personal circumstances.

► **Beneficiary / Nominee** *(delete as applicable)*

Name	
Address	
Post Code	
Relationship to you	Date of birth
Percentage of fund	%

► **Beneficiary / Nominee** *(delete as applicable)*

Name	
Address	
Post Code	
Relationship to you	Date of birth
Percentage of fund	%

► **Beneficiary / Nominee** *(delete as applicable)*

Name	
Address	
Post Code	
Relationship to you	Date of birth
Percentage of fund	%

Please continue on a second form if you have more than 3 beneficiaries. The total fund percentage should equal 100%.

IMPORTANT NOTE: A beneficiary / nominee may take either a Death Benefit Lump Sum or income if they wish. The payment is taxed depending on the member's age at date of death. If the member is under 75 years old when they die, benefits are paid tax free, however a 45% tax charge is levied on the benefits if the member is over 75 years old when they die up until 5th April 2016, and thereafter at the beneficiary's / nominee's marginal tax rate. This is subject to benefits being paid out within 2 years of the date Carey Corporate Pensions UK Limited is notified of the death.