



# Expression of Wish Form

## Plumbing & Mechanical Services (UK) Industry Pension Scheme

A lump sum death benefit may be paid if you die as a member of the Scheme (please see the Scheme Guide for details).

Lump sums can be paid to various beneficiaries, including people nominated by you. If you nominate more than one person, please specify what proportion you want to be paid to each person.

The Trustee has complete discretion when deciding who will receive the lump sum, but they will normally follow your Expression of Wish form. Because of this discretion, any lump sum paid will not normally be included in your estate for inheritance tax purposes.

Please complete this form using **BLOCK CAPITALS**.

### 1. Your personal details

<b>Full name</b>			
<b>Address</b>			
	<b>Postcode</b>		
<b>Email address</b>			
<b>N.I. number</b>		<b>Date of birth</b>	/ /

### 2. Lump Sum

In the event of my death, I would like the Trustee to consider making payment of any lump sum death benefits due to the following beneficiaries.

<b>Full name of beneficiary</b>	<b>Relationship</b>	<b>Share of benefit</b>
		%
		%
		%
		%
<b>TOTAL</b>		<b>100%</b>

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You can use the space below to provide further information, for example if you want to clarify how the lump sum should be allocated in the event of the joint death of you and the main beneficiary (for example, if your main beneficiary is your partner).

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## 3. Personal Information

The Trustee of the Scheme and its advisors and administrators will need to process certain data about you to calculate and pay benefits and to administer the Scheme as a whole. They may do such processing themselves or through any associated company or third party administrator. This data may include items categorised under the Data Protection Act 1998 as 'Sensitive Personal Data', such as information about your nominated beneficiaries for death benefits. If such information about you is shared, it will only happen under conditions of strict confidentiality, and only to the extent necessary to calculate and pay benefits due under the Scheme. By signing the declaration below, you confirm that you agree to the processing of this data for the purposes set out above.

## 4. Declaration

My expression of wish regarding the payment of lump sum death benefits from the Scheme is set out above. This Expression of Wish form overrides any previous Expression of Wish Form made by me in relation to the Scheme.

I agree to the processing of data for the purposes stated above.

<b>Signed</b>	
<b>Date</b>	