




For customers

# Death benefit nomination form

## About this form

- Please use this form to tell us who you'd like to benefit from your funds on your death.
- This form applies to all uncrystallised pensions savings and drawdown funds you hold now or in the future under an Aegon Retirement Choices Self-invested Personal Pension (SIPP) or One Retirement account under the Aegon Self-invested Personal Pension Scheme ('the Scheme').
- You can't use this form for Retiready accounts.
- The information in this form is based on current legislation, which may change in future.

## How to complete this form

- In BLOCK CAPITALS and using a ballpoint pen.
- Read the relevant important information in section 5.
- If you make a mistake or change your mind when completing this form, please don't use correction fluid. You can amend by crossing out and adding the correct detail, then initial the change.
- Make sure you attach any additional sheets of paper or documents to the form.
- Read the declaration in section 4, and sign and date the form before returning it to us.
- Whenever you see this icon  you may need to send us additional material with this form.

Before completing this form you should take specialist advice as to the tax and other consequences for you and your beneficiaries. This is a complex area and we can't provide you with any guarantee about inheritance tax, or other tax consequences, or advise you on what might be best for you.

Once completed, please send the form to Platform Client Services, Aegon, Edinburgh Park, Edinburgh EH12 9SE.

## 1. Personal details – always complete this section

Title

Your investor number

Full forename(s)

Date of birth (dd/mm/yyyy)

Surname

## 2. Your nominations

You can nominate any individual(s), a trust or a charity to benefit from your funds when you die. As scheme administrator, we'll take your nominations into consideration, but the final choice of who to pay benefits to, and the amounts to allocate to them, is at our discretion under the provisions of the Scheme. Please read 4.2 for more information about the effect of your nomination and the possible options available to a beneficiary.

Complete section: 2.1 – to nominate individual beneficiaries

2.2 – to nominate a trust

2.3 – to nominate a charity

The total percentages allocated under 2.1, 2.2 and 2.3 must always add up to 100%.

### 2.1 Nomination of individual beneficiaries

**a** Beneficiary's name

Relationship to you

Allocated percentage

 %

Address

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/> Postcode

**c** Beneficiary's name

Relationship to you

Allocated percentage

 %

Address

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/> Postcode

**b** Beneficiary's name

Relationship to you

Allocated percentage

 %

Address

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/> Postcode

**d** Beneficiary's name

Relationship to you

Allocated percentage

 %

Address

<input type="text"/>
<input type="text"/>
<input type="text"/>
<input type="text"/> Postcode

Are any additional beneficiaries shown on a separate piece of paper?

No

Yes – please attach the sheet to this form, making sure your name, investor number, and this section number and title have been included at the top of the sheet. Then sign and date the completed sheet below the beneficiary details. ✉

## 2. Your nominations – continued

---

### 2.2 Nomination of a trust

You can nominate a trust to receive a lump sum death benefit. You should include a certified copy of the trust with this form.

Name of trust (if any)

Allocated percentage

 %

Date of trust (dd/mm/yyyy)

Name(s) of trustee(s)	Address(es) – including postcode

### 2.3 Nomination of a charity

You can nominate a charity to receive a lump sum death benefit.

Name of charity

Name of charity

Allocated percentage

 %

Allocated percentage

 %

Address

Postcode

Address

Postcode



## 4. Declaration – always complete this section

Please make sure you read the information in section 5 before you sign and date the declaration below. We strongly recommend you speak to an adviser.

In this declaration 'I' means the member and 'you' means Scottish Equitable plc as the scheme administrator of the Aegon Self-invested Personal Pension Scheme.

- 4.1** I'm aware that you have absolute discretion to choose who will benefit from any remaining funds held on my death and that any nomination(s) I've made under section 2 aren't binding on you. I'm aware that special rules apply if I have a Secure retirement income account.
- 4.2** I'm aware that by nominating an individual under section 2, I'm nominating them for the options of drawdown pension, annuity or lump sum, or a combination of these.
- 4.3** Subject to 4.7 opposite, I agree that any nominations made by me under this form revoke any and all previous nominations and expressions of wishes, in whatever form, made by me in relation to my Aegon Retirement Choices SIPP and/or One Retirement Account.
- 4.4** I know that if I want to change any nomination, I can complete a new form at any time (and, subject to 4.7 opposite, if I complete a new form this will revoke any and all nominations and expressions of wishes, in whatever form, previously made by me).
- 4.5** I'm aware that you can only take into account nominations received before I die. If I complete a death benefit nomination form but die before you receive it, you can't take it into account.
- 4.6** I'm aware that any death benefits will only be paid in accordance with the provisions of the Aegon Self-invested Personal Pension Scheme and as permitted and provided for under my contract with Aegon.
- 4.7** If I have a Secure retirement income account that includes a joint life (as defined in my terms and conditions), I agree that any nominations I've made in this form don't apply to that Secure retirement income account if the individual named as the joint life survives me and qualifies as a dependant at the date of my death.

Date (dd/mm/yyyy)

Signature

X	X
---	---

## 5. Important information

---

**Death benefits will only be paid in accordance with the provisions of the Aegon Self-invested Personal Pension Scheme and as provided for under the terms of your contract with Aegon.**

### 5.1 Options for beneficiaries

If we choose someone nominated by you as a beneficiary, we can offer the options of drawdown pension, annuity or lump sum, or a combination of these, at their choice, from the part of the pension funds we decide to allocate to them – depending on what your contract with us allows for. If we choose a charity or trust nominated by you, we can only pay them a lump sum.

If we name someone who wasn't nominated by you as a beneficiary then depending on circumstances at the time of death we may only be able to pay that beneficiary a lump sum from the proportion of the fund we allocate to them.

### 5.2 Your nomination

You can change your death benefit nominations at any time – to do this you'll need to complete a new form and send it to us. We must receive your completed form before you die.

The nominations you make in this form cancel any and all previous nominations you've made (and any later nominations you make will cancel the previous ones). If you've completed any expressions of wishes, these will also be cancelled by the nominations you make in this form. Special rules may apply if you have any Secure retirement income accounts – see section 4.7.

Any valid nomination you make using this form may remain in effect even if your personal circumstances change. That's why it's important that you review your nominations regularly - especially if there's a significant change in your personal circumstances, for example marriage, divorce, the death of a nominated beneficiary or the birth of a child.



We're proud to be the  
Lead Partner of British Tennis.