

Expression of Wishes

This form should be completed to give us the names and addresses of those people you would like to nominate to receive death benefits in the event of your death

1 Member Details

Name:	<input type="text"/>
National insurance number:	<input type="text"/>
Member number (in full):	<input type="text"/>
Date of birth:	<input type="text"/>
Daytime Telephone number:	<input type="text"/>

Guidance notes

This is the number applicable to your SIPP administered by Talbot and Muir.

2 Nominations

I understand that under the provision of the Scheme, any payments due on my death are made at the entire discretion of the Scheme Administrator.

However, in the event of my death, it is my wish that the Scheme Administrator considers making the payment of death benefits to, or for the benefit of, the persons detailed below.

Name and address	Relationship	% of Benefit
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
Total		100%

Whilst the Scheme Administrator may take into account this expression of wishes, this request is not binding upon them.

Although the form allows space for three nominations, there is no restriction on the number of people you can nominate. If there are more than three nominations, please provide details on a separate sheet.

Please make sure the proportions add up to 100%.

If you wish to choose a person(s) whom you would like to benefit only if your other proposed recipients have died before you, please explain this. (For example: wife 100%, or if she dies before you, parents 50% each).

If you wish any payments to a proposed recipient(s) to be conditional on them surviving you by a relatively short period of time, for example for tax reasons, please explain this and give the name of the other recipients to take their place.

Availability of Drawdown

An individual chosen by the Scheme Administrator may wish to take drawdown instead of receiving a lump sum, but this is only possible if they are a dependant or a "nominee". If you wish to ensure that the option of drawdown is available to any potential beneficiary please tick the box below:

In addition to any specific nominations above, I nominate for the purposes of the relevant tax legislation any individual who is eligible to receive a lump sum on my death, so that the Scheme can offer drawdown to them as an alternative.

The definition of "nominee" under tax legislation could stop drawdown being offered to a suitable beneficiary in some situations. An example of this would be if a member doesn't make a nomination. He is survived by his spouse and his brother. The spouse is keen for some benefit to be paid to the brother. The Scheme Administrator can not offer him drawdown, because he was not nominated by the member. The scheme administrator can not nominate him because there is a dependant;

Ticking this box gives the Scheme Administrator greater scope to offer drawdown as an alternative. This does not mean benefits will be paid to all of them.

3 Member Declaration

I consent / do not consent (delete as appropriate) to this Expression of Wishes being made available to the specified beneficiaries detailed above in the event of my death.

I understand that while the Scheme Administrator will bear my wishes in mind when exercising their discretion, the Scheme Administrator is not legally bound by them.

If you experience difficulties accessing any our services due to personal circumstances, we may be able to make some adjustments to help you. Please provide us with details of your needs so we can assess any reasonable adjustments that we can make for you.

The information you provide will help us assess your requirements and make any reasonable adjustments to improve how we work and communicate with you.

We will require your express consent to process this information, and to enable us to share this data with other third parties where appropriate, e.g. investment firms or advisers, to help us and other to continue to meet your needs. Please could you kindly provide this below.

I agree to my information being processed by Talbot and Muir Ltd, to include being shared and gathered between relevant third parties.

Please refer to our Privacy Notice, should you requires further guidance on how we collect and protect your personal information. This can be found on our website www.talbotmuir.co.uk or please ask you adviser or us for a copy.

Your consent to share information is voluntary and you may withdraw your consent at any time. Should you have any questions about this process, or wish to withdraw your consent please contact our Admin Department on 0115 841 500 or via email at customer.support@talbotmuir.co.uk

Signed:

Member name:

Date: