

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:	
National insurance number:	
Member number (in full):	
Date of birth:	
Daytime Telephone number:	

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. (This can include charities, trusts and other organisations as well as individuals.)

Name and address	Relationship	% of Benefit
Total		100%

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.

On my death, I wish the scheme administrator to pay any benefits from my SIPP to the beneficiary(ies), in the proportion set out above. I accept that this is only an expression of my wishes. I understand that whilst the scheme administrator will pay due consideration to those wishes, they have absolute discretion as to the beneficiary(ies) and to the proportion of benefits paid to each beneficiary unless otherwise provided by law.

I understand that if the Scheme Administrator chooses a beneficiary who has not been named above, the definitions of "nominee" and "successor" under tax legislation may mean that drawdown income cannot be offered to that beneficiary. Therefore in addition to the individuals listed, in order to allow the trustees to pay drawdown income to as wide a range of beneficiaries as possible and for the purposes of the relevant tax legislation, I nominate any individual who is eligible to receive a lump sum on my death under the rules of the scheme.

3 Accessing our Services

If your personal circumstances make it challenging to access our services, please provide us with some information so we can explore any reasonable adjustments that may help.

In order to provide additional support, we will need to gather some information about your needs, which can involve sensitive personal information. Due to the nature of this information, we require your express consent to process it for the purpose of providing the relevant support. We may also need to share this data with trusted third parties where appropriate, e.g. investment firms or advisers, to help us, and others to continue to meet your needs.

Your consent to share this more sensitive personal information is entirely voluntary and you may withdraw your consent at any time.

If you wish to consent to us processing your personal information for the purposes of support, please tick below.

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

If you have chosen to consent to this processing, please provide us with details of your needs so we can assess any reasonable adjustments that we can make for you to improve how we work and communicate with you.

Should you have any questions about this process, or wish to withdraw your consent please contact our administration teams in either Nottingham on 0115 841 5000 or Leeds on 0113 200 2980 or via email at customer.support@talbotmuir.co.uk.

We take the privacy and security of your personal information very seriously. The information you (or a third party) provide us with will be processed in accordance with our Privacy Notice which you can access here - <https://nucleusfinancial.com/privacy-notice>

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.

4 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.

I understand that I can change the beneficiaries at any time and that the scheme trustees will refer to the last completed form held.

I declare that this expression of wishes replaces any previous request given by me in connection with the payment of death benefits from the above SIPP.

Signed:

Member name:

Date:

We are able to provide literature in alternative formats. For a Braille, large print, audio or E-text version of this document call us on 0115 841 5000 (or via the Relay UK service on 18001 0115 841 5000).

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