

Section 1 – Your personal details

Surname		Title		Marital status	
Forename(s)		Previous name(s), if any			
Address					
Date of birth	dd/mm/yyyy	National Insurance number			
Telephone		Employer			

Section 2a – Nominee(s) details

In the event of my death, it is my wish that any lump-sum death benefit payable from Derbyshire Pension Fund, including any linked, in-house AVC fund value (if applicable), be paid as follows:

Nominee 1		Percentage share	%
Surname		Title	
Forename(s)			
Address			
Relationship (if any)			
Date of birth (if under 18)	dd/mm/yyyy		

Nominee 2		Percentage share	%
Surname		Title	
Forename(s)			
Address			
Relationship (if any)			
Date of birth (if under 18)	dd/mm/yyyy		

Nominee 3		Percentage share	%
Surname		Title	
Forename(s)			
Address			
Relationship (if any)			
Date of birth (if under 18)	dd/mm/yyyy		

Nominee 4		Percentage share	%
Surname		Title	
Forename(s)			
Address			
Relationship (if any)			
Date of birth (if under 18)	dd/mm/yyyy		

Section 2b – OR, revoke previous nominations only

I wish to revoke my previous nominations, yet **not** make another at this time: (only tick if you have not completed section 2a)

Section 3 – Declaration

I understand that this form replaces any previous expression of wish I have signed and that Derbyshire Pension Fund has discretion in making final payment.

Before returning, please use the checklist attached; if the form is completed incorrectly it will be rejected and you will need to complete a new form.

Your signature		Date	dd/mm/yyyy
Please make sure you sign and date this form in the presence of your witness.			
Witness signature		Date	dd/mm/yyyy
Witness full name			
Witness home address			

Checklist

Complete before sending the form: We cannot accept incorrectly completed forms

- All fields in section 1 are complete
- Section 2a or 2b has been completed, not both
- All percentage shares add up to 100%
- The form has been signed and witnessed on the **same** day
- The witness is over 18 and not one of the nominated beneficiaries
- Any amendments have been initialled and dated
- Trust arrangements are in place for nominees who are aged under 18, otherwise the lump sum may be paid in line with the rest of your estate

Guidance

This form is to make an expression of wish to indicate, in section **2a**, who you would like to receive any lump sum payable from Derbyshire Pension Fund in the event of your death; this may be an individual, or split among family members or friends, or an organisation, such as a charity.

- If you wish to nominate a couple, please name them individually with the appropriate % against each
- If you wish to nominate more than four beneficiaries, please attach an additional expression of wish form

ALTERNATIVELY, you can use section **2b** if your circumstances have changed and you wish to revoke your previous nomination(s), but not make another at this time.

Completed forms should be sent to:

Derbyshire Pension Fund, County Hall, Matlock, DE4 3AH

We will write to you to confirm your form is effective.

Frequently asked questions

Why do it? The advantage of making an expression of wish is that the payments can normally be made quickly without waiting for your estate to be settled. Also, a nomination usually means that the payment is exempt from inheritance tax. If you have already written a will, you can still complete the expression of wish form to speed up the process.

What happens if my circumstances change? You can change your expression of wish at any time by completing a new form and sending it to us. If any one of your nominees die you will need to complete a new form. If you have made an expression of wish in favour of your spouse/partner and you subsequently divorce or dissolve the partnership, then the expression of wish will no longer be valid. You will need to complete a new expression of wish form, even if you want to nominate the same people.

What will happen to my lump sum if I don't make an expression of wish? Derbyshire Pension Fund has absolute discretion regarding who to make payment to. If you do not declare an expression of wish, the lump sum may be paid to your estate and subsequently to whoever is legally entitled to receive payment. The Probate Office decide who that is and will issue a Grant of Probate or Letters of Administration, depending on whether you have written a will or not. This process can take time and the lump sum will then form part of your estate and may be liable for inheritance tax.

Further information can be found on our website: derbyshirepensionfund.org.uk