



Pensions

Nomination of beneficiaries form

1 Important information

Please read this section before completing this form.

- If you need any help completing this form you should speak to your financial adviser.
- If you die before taking all your pension savings under your plan, the value of your plan will be paid out in accordance with either the rules of The Royal London Personal Pension Scheme (No2), or The Royal London Stakeholder Pension Scheme (No2). You can ask for a copy of these at any time.
- You can complete this form to nominate your beneficiaries if you have a personal or workplace pension with us.
- You should return your completed form to **Royal London, Royal London House, Alderley Park, Congleton Road, Nether Alderley, Macclesfield, SK10 4EL**
- If you're part of a Retirement Solutions Company Pension Plan or an Executive Pension Plan, you'll need to give your nominations to your trustees.

2 About you

Please complete this section with your details.

***Indicates a required field.**

Name*	
Plan number*	
National Insurance number*	
You'll find this on your National Insurance card, benefit letter, payslip or P60.	
Date of birth*	
Email address*	
Telephone number (optional)	
Address*	
	Postcode*

3 Your death benefits

Please read this section carefully.

If you die before taking all your retirement savings under your plan, the value of your plan will be paid out in accordance with the rules of The Royal London Personal Pension Scheme (No 2) or The Royal London Stakeholder Pension Scheme (No2).

We (Royal London, the administrator of the above scheme) will use our discretion when deciding who should receive the value of your plan in the event you die before taking all your retirement savings. You can use the table below to tell us who you would like your retirement savings to be passed onto. Any nomination is not legally binding but we'll seek to follow your wishes. We will however, make changes if we feel it is right to do so. For example if your personal circumstances had changed since you last updated your beneficiaries, such as divorce or separation. It's therefore very important that you let us know if you wish to change your nomination at any point.

By distributing the value of your plan in this way, it means that the payment will not normally be subject to inheritance tax.

Full name	Relationship	Allocation
Total	N/A	100%

Example table below

Full name	Relationship	Allocation
Mr John Sample	Spouse	33.34%
Miss Rachel Sample	Child	33.33%
Mr James Sample	Child	33.33%
Total	N/A	100%

Need more space? If you'd like to list more than six names or give us additional information please tick the box and provide the details in section 4. ☐

When completing this application form, you should discuss with a financial adviser other ways in which the value of your plan could be paid out. For example, you could direct us to make the payment to a named person. However, we would be legally bound by that nomination and if, at a later date your personal circumstances change and you forget to tell us, we would be legally bound to make the payment to the nominated named person that we hold on our records (which could, for example, be an ex-partner). The payment may also be subject to inheritance tax.

If you would like your death benefits to be paid in a different way, please make a request in writing.

When we're notified of your death, we'll explain to your beneficiaries the different ways in which pension savings can be paid to them. We only use this information to pay the pensions savings in the event of your death. Please make sure your beneficiaries are aware of how we use their information. Remember that when you're choosing, you can't choose who any remaining money can be paid to when your beneficiaries die.

Signature

Date _____

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4 Additional information



Royal London
royallondon.com

**We're happy to provide your documents in a different format, such as braille,
large print or audio, just ask us when you get in touch.**

The Royal London Mutual Insurance Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. The firm is on the Financial Services Register, registration number 117672. Registered in England and Wales number 99064.
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