

## Expression of Wish - Disposal of Death Benefit

This Form should be completed to provide details of those people you would like to receive any benefit payable under the Scheme on your death. Please sign and date the Declaration overleaf.

This Expression of Wish does not bind the Trustee of the Scheme, but will help the Trustee to pay out benefits in line with your wishes. Please note, in certain circumstances, Wealthtime may be obliged under the relevant legislation to make payments other than to individuals of your choosing. Please see Wealthtime Private Client Service Key Features and Terms and Conditions for further information.

The Expression of Wish can be changed in writing at any time.

### 1 Details

<p>Name</p> <input type="text"/>	<p>Name</p> <input type="text"/>
<p>Address</p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<p>Address</p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<p>Postcode</p> <input type="text"/>	<p>Postcode</p> <input type="text"/>
<p>Date of birth</p> <input type="text"/>	<p>Date of birth</p> <input type="text"/>
<p>Relationship</p> <input type="text"/>	<p>Relationship</p> <input type="text"/>
<p>Percentage of benefit (%)</p> <input type="text"/>	<p>Percentage of benefit (%)</p> <input type="text"/>
<p>Name</p> <input type="text"/>	<p>Name</p> <input type="text"/>
<p>Address</p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<p>Address</p> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
<p>Postcode</p> <input type="text"/>	<p>Postcode</p> <input type="text"/>
<p>Date of birth</p> <input type="text"/>	<p>Date of birth</p> <input type="text"/>
<p>Relationship</p> <input type="text"/>	<p>Relationship</p> <input type="text"/>
<p>Percentage of benefit (%)</p> <input type="text"/>	<p>Percentage of benefit (%)</p> <input type="text"/>

By naming an individual they will be able to choose either the lump sum option or (as nominee or dependant) a pension or annuity (or a combination of the three options).

## 2 Charity Nomination

Please provide details of any funds to be paid to charity.

Charity Name

Address of Charity

Postcode

Registration No. (if known)

Percentage of benefit (%)

**Please note:**

- Any chosen charity must be a UK registered charity.

## 3 Trust Nomination

Name of Trust

Name of Trustees

Date of Trust

Address where Trust is held

Postcode

**Please note:**

- In the event of death, Wealthtime will require written confirmation from the above named Trustee(s) confirming that the Trust is a 'valid trust' as defined in the Scheme Rules.
- Payment to the Trust will be made at the discretion of Wealthtime in accordance with the Scheme Rules.
- Wealthtime is not a Trust expert and cannot be held responsible for ensuring a Trust fulfils the purposes for which it was intended.

## 4 Your Declaration

I understand that Wealthtime will assume that where I have disclosed information about another person I have:

- Obtained their consent to disclose such information and
- Informed them of the purposes for which their information will be processed.

Name of Member

Product Number

Signature

Date

If you require this document in an alternative format please contact us.

The Wealthtime Private Client Service provides a reporting and administration facility and is provided by Wealthtime Limited. Wealthtime Limited (registered number 6016480) is registered in England and has its registered office at The Oak House, Barford Lane, Downton, Salisbury, Wiltshire. SP5 3QA. Telephone: 01725 512925. Fax: 01725 513493. Web: [www.wealthtime.co.uk](http://www.wealthtime.co.uk). Wealthtime Limited is authorised and regulated by the Financial Conduct Authority under Firm Reference Number 468461 and you can check this authorisation at [www.fca.org.uk/register](http://www.fca.org.uk/register) or by calling the Financial Conduct Authority on 0800 111 6768.

The Wealthtime SIPP is established by Wealthtime Limited, which has appointed Wealthtime Trustees Limited as Trustee and Wealthtime Limited as Scheme Operator. Wealthtime Trustees Limited (registered number 6243467) is registered in England and has its registered office at The Oak House, Barford Lane, Downton, Salisbury, Wiltshire. SP5 3QA.