

UNIVERSITY OF YORK PENSION FUND

Nomination form

Your details

Title: _____

Forename: _____

Other (middle) names: _____

Surname: _____

National Insurance number: _____ Date of birth: _____

Your contact details

Home address: _____

Telephone number: _____

Personal email address: _____

Beneficiary 1

Title and full legal name: _____

Address: _____

Date of birth: _____

Relationship to you: _____

Percentage awarded: _____

Beneficiary 2

Title and full legal name: _____

Address: _____

Date of birth: _____

Relationship to you: _____

Percentage awarded: _____

Beneficiary 3

Title and full legal name: _____

Address: _____

Date of birth: _____

Relationship to you: _____

Percentage awarded: _____

Beneficiary 4

Title and full legal name: _____

Address: _____

Date of birth: _____

Relationship to you: _____

Percentage awarded: _____

Comments / alternative instructions

Please use this space to outline any additional information that you'd like the Trustee to take into account in making its decision about who to pay any lump sum to in the event of your death.

Signature

If I die, I would like the Trustee of the University of York Pension Fund to pay any lump sum due in line with the wishes I have outlined above. I understand that the Trustee retains the discretion of who to pay.

You must sign the form using a wet ink signature.

Signed:

Date:

What to do next

Please return your completed form to:

Pensions Office
University of York
Heslington
York
YO10 5DD

Notes

Lump sum death grant

In some circumstances, the University of York Pension Fund provides for a lump sum to be paid in the event of your death. The amount payable is dependant upon your age and status in the Fund at the time of your death.

The lump sum is payable in addition to any pension that may be payable to a spouse, registered civil partner or child.

Whilst it is possible to nominate who you want the lump sum element of the death benefit to go to, it is not possible for you to assign who receives any other benefits from your pension in the event of your death (e.g. spouse's pension). This is determined by the scheme rules.

You should contact the [Pensions Team](#) with any specific questions about the death benefits that may apply in your circumstances.

Beneficiaries

You are able, by completing this form, to inform the Trustee of who you would like this payment to be made to. Whilst your wishes will normally be taken into account, the Trustee retains the discretion of who to pay. You can nominate one person, or can split the amount payable between a number of beneficiaries. You can even nominate a charity or charities to receive some or all of the lump sum. If you have not completed a nomination form, if your nomination may not be up to date or if your nominees have died, the Trustee will make any payment due to your dependants, relatives or estate as they see fit.

Ensure that the percentages all add up to 100%.

Data protection

The Trustee is responsible for the governance and administration of the Scheme. For the purposes of the General Data Protection Regulation which came into force on 25th May 2018, the Trustee is the data controller in relation to the Scheme and the Trustee is ultimately responsible for compliance with all data protection laws. The Trustee will keep your personal data, and that of anyone you nominate, in accordance with the law and regulatory guidance, for as long as is necessary for the purpose(s) for which it was collected. The Trustee will share the personal data it holds as necessary with the Company Secretary and with other advisers and service providers used to help administer the Scheme.

For full details of how the Trustee obtains, uses and protects any personal data that you provide, or that is otherwise obtained or generated by the Trustee, please see the University of York Pension Fund's Privacy Notice, which is available on our website here <https://www.york.ac.uk/pensions>. Please contact the Pensions Team if you have any questions regarding this.