

EXPRESSION OF WISHES FORM

SECTION A: PERSONAL DETAILS

PLEASE USE CAPITAL LETTERS

Surname	Title
First name(s)	Membership Number

SECTION B: EXPRESSION OF WISHES

By completing this form, the Trustee will be able to take your wishes into consideration when distributing any lump sum payable on your death. This form is not binding on the Trustee. As payments are made at the discretion of the Trustee, they are not subject to inheritance tax under current legislation. The range of permissible beneficiaries is very wide and includes your spouse, civil partner, children, dependants, and any other relative, person or bodies, e.g. charitable organisations. You can change your mind at anytime by completing a new form.

I wish the Trustee to consider the person or persons named below as possible beneficiaries of any lump sum benefits that are payable on my death. I understand that this form supersedes any previous Expression of Wishes Form or Nomination Form.

1

Surname
First names
Home address

Relationship	Proportion of benefit	%
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2

Surname
First names
Home address

Relationship	Proportion of benefit	%
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3

Surname
First names
Home address

Relationship	Proportion of benefit	%
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4

Surname
First names
Home address

Relationship	Proportion of benefit	%
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If you wish to add further beneficiaries please use another form.

Total	100%
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I acknowledge that the information on this form is held and processed by The Cheviot Trust, my employer and organisations providing services for the purposes of administering the scheme, in accordance with the Data Protection Act 2018 and the General Data Protection Regulation. I acknowledge that as a result of that Act there is a possibility that the information contained in this form could be disclosed to the beneficiaries named above. Further details about how we use your personal data can be found in our Privacy policy which is available at: www.mycheviotpension.com/privacy-policy/

Signature:	Date:
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Please complete this form and return to the following address:

**The Cheviot Trust, Kingswood House, 58 – 64 Baxter Avenue, Southend-on-Sea, Essex
SS2 6BG**

T. 01702 354024

E. people@cheviottrust.com

W. www.mycheviotpension.com