

## Death Grant - Expression of Wish Form

(Before completing this form please see the notes overleaf)

### Your Personal Details (Please complete in **CAPITALS**)

Surname:

First Names:

Home Address:

NI No:  Job Title:

Pension Fund

### Details of Beneficiaries (Please ensure that you have read the notes overleaf before completing this form)

Name	Address	Relationship (if any)	Percentage share
<b>TOTAL</b>			<b>100%</b>

In the event of my death I wish that any death grant is paid to the beneficiaries named above in the proportions stated.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

The details recorded on this form will appear on your next annual statement of benefits. The Pensions Shared Service will also acknowledge receipt of this form if you attach a written request.

## Death Grant - Expression of Wish Form

This form has been designed for members of the Local Government Pension Scheme to specify a beneficiary or beneficiaries to receive the lump sum death grant that may be payable in the event of their death. The amount of the death grant is normally equal to three years' salary in the case of death in service. There are also limited circumstances where a reduced death grant may be payable after a member is already in receipt of their pension benefits.

***Please ensure that you read the following notes before completing the form.***

- In accordance with current legislation, the appropriate administering authority (either Camden, Merton, Richmond, Waltham Forest or Wandsworth Council) retains absolute discretion as to whom any death grant is paid. In most circumstances, however, the grant will be paid to the beneficiaries named on this expression of wish form without any liability for inheritance tax.
- It is possible to specify any number of individuals or incorporated or unincorporated bodies to receive the death grant. You can also nominate a registered charity.
- If you wish for part or all of your death grant to be paid to your estate, please write 'To my estate' under 'Name' overleaf and the percentage share. Payments made to the estate may be subject to inheritance tax.
- When completing this form, please ensure that the percentage share column is completed for each individual beneficiary (even if you are specifying only one) and that the sum of the percentage shares equals 100%.
- Once made, the beneficiaries can be changed at any time by completing another form. If your personal circumstances change (e.g. marriage, civil partnership, divorce, legal separation etc) then please complete a further form to ensure your wishes are complied with in the event of your death.
- If the appropriate administering authority has not made payment within two years of the date of your death, the death grant will form part of your estate and payment will be made to your personal representatives and the payment could be subject to inheritance tax.
- You may, if you wish, complete an additional form to cover the eventuality that your chosen beneficiary/ beneficiaries predecease you. Once you have completed the additional form(s), you should **mark clearly in the top right hand corner of each form the order in which they are to be recorded i.e. First Priority, Second Priority, etc.** The forms should then be submitted together to avoid any confusion.

If you have any queries about completing the form, or any other queries regarding your pension rights in general, please do not hesitate to contact the Pensions Shared Service on 020 8871 8036. Please return completed form to:-

Pensions Shared Service  
PO BOX 72351  
London SW18 9LQ