ALLTRUST
A UAP Group Company

FAMILY PENSION TRUST
Expression of Wish form

February 2025

Member Details

Please complete the form in full using BLOCK CAPITALS and dark ink.

Member Name

Scheme Name

Scheme Number

Nomination of Beneficiaries

In the event of my death should there be an entitlement to a lump sum payment or beneficiary's pension I wish the payment/s to be made as follows:

Name of Dependant/Beneficiary	Relationship	%

Nomination of a Charity

In the event of there being no surviving financial dependant the part of your fund not payable to a nominated beneficiary as listed above may instead be paid to a charity. If you wish to nominate a charity/ies please name them below. Please note this should be nominated now and cannot be left to the discretion of the Trustees or Operator.

Name of charity	%

Declaration

I understand that the Trustees and Operator will not be bound by this form and that it is only an expression of my wishes.

Print Name

Signature

Date Signed

Additional notes and important information

The Trustees and the Operator will have regard to but shall not be bound necessarily by the wishes expressed in writing in this form. This will include offering the named dependant/beneficiary the option of a drawdown income or lump sum. Where you wish the Trustees and Operator to consider only offering a lump sum or drawdown, please notify us in writing.

If you leave the spaces blank, the Trustees with the agreement of the Operator will exercise full discretion as to whom benefits should be paid. The Trustees with the agreement of the Operator cannot however pay to a charity if none has been nominated above.

This form will replace any previous equivalent forms.

Alltrust requires members to obtain regulated financial advice for certain pension transactions, including but not limited to benefit crystallisation, the transfer of pensions into or out of your Alltrust pension, and the transfer or purchase of non-standard investments, unless the member has been formally assessed and accepted as a Knowledgeable Investor by Alltrust.

Where advice is required, it must be provided by a suitably qualified and regulated financial adviser. That adviser must have a signed agreement with us, except in the case of transfers out, where they must simply hold the appropriate regulatory permissions. This requirement is in place to ensure decisions are made in the best interests of our members and in line with regulatory expectations.

Alltrust reserves the right to decline any instruction that does not meet this requirement.

If you are unsure whether advice is required for your specific request, please contact us before proceeding.

Alltrust Current Terms of Business are available to view on our website.

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