



THE EQUITABLE LIFE ASSURANCE SOCIETY  
FOUNDED 1762

*The Equitable Personal Pension Plan*

**Nomination of beneficiaries of death benefits**

Please complete in capital letters, after reading the notes overleaf.

To the administrator of The Equitable Personal Pension Scheme:

Surname

Forenames

Plan number  
(if known)

In the event of my death, it is my wish that any lump sum benefits available under the scheme should be paid as follows.

(A) In respect of the attached application/above numbered Plan/following segment reference number\* (if known)

£  in the following proportion to the individuals named below:

	(full names)	(relationship, if any)
%	<input type="text"/>	<input type="text"/>
%	<input type="text"/>	<input type="text"/>
%	<input type="text"/>	<input type="text"/>
%	<input type="text"/>	<input type="text"/>
(Total 100%)		

(B) plus the balance, if any, in the following proportions to the individuals named below

%	<input type="text"/>	<input type="text"/>
%	<input type="text"/>	<input type="text"/>
%	<input type="text"/>	<input type="text"/>
%	<input type="text"/>	<input type="text"/>
(Total 100%)		

I understand that the expression of this wish is in no way binding on the administrator.

Signed  Date

It is recommended that you make a copy for your records.

\* delete words not applicable

Ref:

**SEE NOTES OVERLEAF**

## Notes

1. It is a requirement of the rules of the Scheme that nominations made are in writing.
2. You should complete section (A) of the form if you wish to earmark a certain amount of money for specific individuals. Where this is in respect of additional life cover, the appropriate segment reference number should be entered. Section (B) should be used for the balance, if any, or where no specific amount is to be earmarked.
3. In describing the amount of benefits in favour of each nominee, you may use any description that identifies the amount unambiguously. The standard form overleaf will be usable for most situations. It can be modified by the addition of further lines as required or by the addition of further blocks of allocation of specific benefits as required.
4. It is acceptable for you to make up your own nomination provided it covers all the benefits that may arise on your death and that where amounts are split between individuals the description of the split is unambiguous. Remember that benefits on death before taking pension may arise from any in force life cover and the return of any funds for pension benefit.
5. Where benefits arise under protected rights or from transfer values in respect of benefits under occupational pension schemes it may be a requirement of the rules that part or all of the benefits are paid as pension to a surviving spouse.
6. The Society will not comment on the completeness or adequacy of any nomination.