

DEATH GRANT – EXPRESSION OF WISH FORM

Do NOT complete this form before the date you joined the Essex Pension Fund

Use block capitals for all sections and before returning, check you have signed this form overleaf.

Personal details

Name.....	Date of Birth <input type="text"/>
NI Number <input type="text"/>	Email.....
Address.....	
Employer	Payroll number.....

To Essex Pension Fund Administrators

I wish you, in the exercise of your absolute discretion, to consider paying any lump sum death grant due from the Local Government Pension Scheme to the following:

Name.....	Proportion <input type="text"/> %
Address.....	
Relationship.....	Date of Birth <input type="text"/>

Name.....	Proportion <input type="text"/> %
Address.....	
Relationship.....	Date of Birth <input type="text"/>

Name.....	Proportion <input type="text"/> %
Address.....	
Relationship.....	Date of Birth <input type="text"/>

Name.....	Proportion <input type="text"/> %
Address.....	
Relationship.....	Date of Birth <input type="text"/>

If you wish to nominate additional beneficiaries, please provide full details on a separate sheet and attach it to this form. You must ensure the proportions add up to 100%.

If you would like to provide any additional information to support your nomination, please detail below:

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Signature

Signed..... Date.....

“Data Protection: Essex County Council (as the Administering Authority of the Fund) is a Data Controller under the General Data Protection Regulations. We store, hold and manage your personal data in line with statutory requirements to provide you with pension administration services. For more information about how we hold your data, who we share it with and what rights you have to request information from the Fund, see the Forms and publications section of our website www.essexpensionfund.co.uk.”

Return completed form to:

Essex Pension Fund
Seax House
County Hall
Chelmsford
CM1 1QH

Email: pensionenquiries@essex.gov.uk

Your nomination can be revised at any time by submitting a further form, available from our website at www.essexpensionfund.co.uk.

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READ THESE NOTES CAREFULLY BEFORE COMPLETING THE ATTACHED FORM

The advantage of you nominating beneficiaries of any potential death grant is that it may be possible to make payment without waiting for your Estate to be settled and normally without any liability to Inheritance Tax.

Although the administrators of Essex Pension Fund will have the greatest regard to your wishes as indicated on the attached form, they are not legally bound by them because for the tax advantages to apply they must retain absolute discretion as to the distribution of the grant.

Before making any payment in accordance with your wishes, the administrators of Essex Pension Fund will consider whether there are any other parties who may have a claim on the death grant and could contest the intended payment. Should you wish to provide additional information to support your nomination; this can be entered on the reverse of the form.

Note that:

1. You may nominate whoever you would like to receive your death grant. A nominee can include a relative, partner, family friend or organisation such as a charity club or society.
2. Your nomination cannot be accepted, and the form will be returned to you if:
 - a) it is not signed and dated
 - b) it is dated or received before you join Essex Pension Fund
 - c) it is post-dated
 - d) the proportions do not add up to 100%
3. A nomination will not be treated by Essex Pension Fund as being in force if at the time of a member's death:
 - a) The nominated beneficiary has died
 - b) The Fund is of the opinion that payment of the death grant to the nominated beneficiary is not reasonably practicable in all circumstances
 - c) The nominated beneficiary is a former spouse from whom you have since divorced, a former registered civil partner where the partnership has been dissolved, or a former cohabiting partner you no longer live with (if you wish to nominate a former spouse, registered civil partner, or cohabiting partner, a new expression of wish must be made and dated after the date of divorce or dissolution).
4. If you have more than one employment in Essex Pension Fund, your wishes will be applied to all of your pension records unless you complete a separate nomination form but see note 5 below.
5. If you have more than one pension with the LGPS only one death grant, the largest payment, will normally be payable. This will either be the combined value of all the death in service lump sums, or the combined value of the death grants due from deferred pensions and pensions already in payment to you. Prior to making a payment, we will ask your nominated beneficiaries to declare whether they know of any death grants payable from other LGPS funds.
6. You should revise your expression of wish whenever your circumstances change by completing a further form, available to download from our website at www.essexpensionfund.co.uk or from your Employer who should be able to provide you with a copy.
7. You will receive an acknowledgement once your pension record has been updated with your expression of wish