

**Please complete in block capitals and black ink**

I \_\_\_\_\_  
of \_\_\_\_\_

Postcode \_\_\_\_\_

National Insurance no.

St. James's Place UK plc, as administrator of the above Registered Pension Schemes, will normally have discretion on how the benefit on death is to be distributed. St. James's Place UK plc is not obliged to follow your wishes but will take them into account.

would like you to consider payments of death benefits from my St. James's Place pension(s) in accordance with the instructions below.

I would like you to consult with my St. James's Place Partner prior to making any payment and give due consideration to acting on their advice.

If you wish St. James's Place to consider making payment of a lump sum on death to the trustees of Legacy/Asset Preservation Trust, tick 'Yes', otherwise tick 'No'. (If 'Yes', please provide a copy of the Trust and any Letter of Wishes.)  Yes  No

If 'No', do you wish St. James's Place to consider making payment of a lump sum on death to a non St. James's Place personal trust? (If 'Yes', please provide a copy of the Trust and any Letter of Wishes.)  Yes  No

I have also entered details below and continued overleaf of the person(s) I would wish to receive benefits on my death and indicated whether I would like St. James's Place to consider paying benefits as a lump sum or income or both.

	First beneficiary	Second beneficiary
Full name	_____	_____
Date of birth	DDMMYYYY	DDMMYYYY
Address	_____ _____ _____	_____ _____ _____
Postcode	_____	_____
Country if outside UK	_____	_____
Relationship (if any)	_____	_____
Proportion of benefits	% <input type="checkbox"/> Lump sum <input type="checkbox"/> Income	% <input type="checkbox"/> Lump sum <input type="checkbox"/> Income

	Third beneficiary	Fourth beneficiary
Full name	<input type="text"/>	<input type="text"/>
Date of birth	D D M M Y Y Y Y	D D M M Y Y Y Y
Address	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Country if outside UK	<input type="text"/>	<input type="text"/>
Relationship (if any)	<input type="text"/>	<input type="text"/>
Proportion of benefits	% <input type="checkbox"/> Lump sum <input type="checkbox"/> Income	% <input type="checkbox"/> Lump sum <input type="checkbox"/> Income

  

	Fifth beneficiary	Sixth beneficiary
Full name	<input type="text"/>	<input type="text"/>
Date of birth	D D M M Y Y Y Y	D D M M Y Y Y Y
Address	<input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/>
Postcode	<input type="text"/>	<input type="text"/>
Country if outside UK	<input type="text"/>	<input type="text"/>
Relationship (if any)	<input type="text"/>	<input type="text"/>
Proportion of benefits	% <input type="checkbox"/> Lump sum <input type="checkbox"/> Income	% <input type="checkbox"/> Lump sum <input type="checkbox"/> Income

### Data Protection

Your Partner and/or St. James's Place\* are the data controllers of any personal data you provide to us on this form and any further information which you subsequently provide to us. Your Partner and St. James's Place\* each have a legal obligation to comply with applicable data protection legislation. For further information on our uses of your personal data, and your rights in relation to your personal data, please see the Partner's Privacy Policy, which can be accessed on their website and/or the Privacy Policy of St. James's Place\*, which can be accessed at [www.sjp.co.uk/privacy](http://www.sjp.co.uk/privacy). A paper copy of the Privacy Policy is available on request from your Partner.

Where you are providing us with personal data about other individuals, you will inform each of them that you are providing their information to us, refer them to the Partner's Privacy Policy, which can be accessed on their website and/or the Privacy Policy of St. James's Place\*, which can be accessed at [www.sjp.co.uk/privacy](http://www.sjp.co.uk/privacy).

\* 'St. James's Place' is a wealth management group which includes St. James's Place plc and its subsidiaries. A list of subsidiaries is available within the Privacy Policy.

### Client Declaration

<i>Client signature</i>	<i>Date</i>
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