

The Local Government Pension Scheme Regulations 2013

Payment of death grant – Expression of wish form.

Please complete in black ink and in capital letters.

Scheme employer/former Scheme employer			
Name		Date of Birth	
Employee Number		N.I. No	

I am a:

Contributing member	<input type="checkbox"/>	Deferred member	<input type="checkbox"/>	Pensioner	<input type="checkbox"/>
Pension Credit member	<input type="checkbox"/>	Deferred Pensioner Member <sup>1</sup>			<input type="checkbox"/>

When my LGPS Pension Fund is deciding who should receive any lump sum death grant which may become payable from the Fund (s) and any in house additional voluntary contribution arrangement, it should be aware that I wish it to be paid to the following person(s) / organisation(s) in the proportions shown.

Full name and address  Postcode	Relationship to you (if any)
	Proportion of total
Full name and address  Postcode	Relationship to you (if any)
	Proportion of total
Full name and address  Postcode	Relationship to you (if any)
	Proportion of total

If you wish the death grant to be shared between more than three recipients please provide the appropriate details on a separate sheet of paper attached to this form. I understand and accept that:

- a) I can revoke or revise this Expression of Wish Form at any time by completing and forwarding another form to my scheme employer, and
- b) A completed Expression of Wish Form is not binding on the London Borough of Barnet.
- c) I have read and understood the Data Protection notice displayed in point 1 of the attached notes

<b>Signed</b>		<b>Date</b>	
<b>For Scheme employer use</b>			
Check List:			
✓ Scan and email form to Capita.			
✓ Retain original form on Scheme employer's file.			
Certification signature:		Date:	
Print Name		Contact No:	

<sup>1</sup> Former recipients of Tier 3 Ill health pensions which are currently discontinued.

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### Explanatory Notes

#### Please read before completing the Expression of Wish Form

1. Although your expression of wish is not binding on your LGPS Pension Fund, we will normally carry out your wishes in deciding who should be paid your death grant. Payment can then be made without delay and, normally, without any liability for inheritance tax.
2. Where you have contributed to an IHAVC or have purchased additional life cover, this form will be used to determine the location of the payment of these benefits.
3. You may name anyone, whether or not they are a relative or a dependant, as a beneficiary to receive all or part of your death grant. You can also nominate a registered charity. The London Borough of Barnet Pension Fund can decide to pay the Death Grant, in whatever proportion it considers appropriate, to your spouse/civil partner, any eligible children, relatives (including a former spouse/civil partner) or to your estate, but your wishes will be taken into account when deciding. You should note that if any of the death grant is paid to your estate it may be liable to inheritance tax.
4. If you don't want the death grant to be shared equally between your named beneficiaries, you should enter the proportions to be paid on the form, e.g.  $\frac{1}{4}$ ,  $\frac{1}{2}$  etc. If you wish the death grant to be shared amongst more than three beneficiaries please give similar details to those requested overleaf on a separate sheet of paper. In the event that the proportions entered do not add up to the full amount of the death grant, the difference may be paid to your estate.
5. If you want your LGPS Pension Fund to pay part or all of your death grant to your estate, please write "To my estate" under "name(s)" overleaf, and also the proportion if it is not the full amount. As mentioned in note 2 above, any death grant included as part of your estate may be subject to inheritance tax.
6. As your preferred beneficiary might die **before** your death grant becomes payable, you may want to name another person or persons to whom you would like your LGPS Pension Fund to pay the death grant should this unfortunate situation arise. If you wish to do this, please enter the relevant details overleaf or on a separate sheet of paper indicating clearly your order of preference.
7. If your circumstances alter, or you change your mind about who should receive your death grant, ask your scheme employer or Capita for another expression of wish form **immediately**. When your scheme employer and Capita receive the newly completed form, the earlier one will automatically be cancelled.
8. If your personal circumstances change you will need to complete a further expression of wish form.
9. If you want any further details about these arrangements, please contact Capita at the address shown, below.
10. Your completed expression of wish form should be forwarded to:

By Post	London Borough of Barnet Capita Employee Benefits 11b Lingfield Point Darlington DL1 1AX
By e-mail	<a href="mailto:barnetpensions@capita.co.uk">barnetpensions@capita.co.uk</a>

#### REMEMBER

**It is your responsibility to keep your expression of wish form up to date.  
Please keep a copy in a safe place for future reference**

#### General Data Protection Regulations:

Barnet Council will collect and use the information you give us to undertake our functions as a local authority and deliver services to you. It is our responsibility to ensure that your information is kept safe. Where necessary and legally allowed, we will share your information with trusted external organisations, commissioned partners and contracted service providers in order to deliver services and support to you.

The information we collect may be used to better understand your use of our services and assist us in improving our services. This is to ensure we are using public funds in the best possible way. Under our duty to protect public money we may use the information you have provided for the prevention and detection of crime.

For further details of how we use your information and to understand your rights please visit [www.barnet.gov.uk/privacy](http://www.barnet.gov.uk/privacy) or email [data.protection@barnet.gov.uk](mailto:data.protection@barnet.gov.uk) to request a full copy of our privacy notice.