

Nomination of Beneficiary Form

Please complete the form in **BLACK INK** and remember to sign and date it.

See 'Your questions answered' on the reverse for help filling out the form.

My details:

Surname:	<input type="text"/>	Title:	<input type="text"/>
Forename(s):	<input type="text"/>	Date of Birth:	<input type="text"/>
Employee No:	<input type="text"/>	Pension No:	<input type="text"/>

(on your payslip)

Part 1: To the Trustees

In the event of my death, I would like the Trustees to consider paying any **lump sum death benefit** (life assurance) to the following people and in the proportions shown below:

Full Name	Relationship	% lump sum benefit	Address of Beneficiary
Total		100%	

Part 2: To Legal & General Assurance Society Limited ('L&G')

In the event of my death, I would like L&G to consider **returning the funds that have been invested** to the following people in the proportions shown below:

Full Name	Relationship	% of invested funds	Address of Beneficiary
Total		100%	

I understand that this is only an expression of my wishes and is not legally binding on the Trustees or Legal & General. It may be revoked or revised by me at any time.

Please sign here:

Signature:	<input type="text"/>	Date:	<input type="text"/>
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Please return your completed form to:

Alliance Healthcare & Boots Pensions
Nottingham NG90 7GP

If you have any questions, please contact the Alliance Healthcare & Boots Pensions helpline on 0115 959 1670 (internal 72 16 70), Mon-Fri 08.45-16.45 or email group.pensions@boots.co.uk.

The Trustees, Legal & General and Alliance Healthcare & Boots Pensions Department will hold the personal information you supply on this form to facilitate the payment of any benefits due on your death.

Your questions **answered**

What is this form for?

This form gives you the opportunity to tell the Trustees and Legal & General who you would prefer to receive the lump sum death benefit and/or the return of your investments in the event of your death.

How many people can I nominate?

You can nominate as many people as you like. Simply state what percentage of the funds you wish to be paid to each person. All you have to do is make sure that the percentage for each adds up to 100%.

Who will see this form?

The form will be treated as confidential and will be kept by the Alliance Healthcare & Boots Pensions Department and Legal & General.

How and when can I change the form?

If your circumstances change and/or you wish to amend the details, please download it from the pensions website, www.ahb-ukpensionportal.co.uk. If you do not have internet access, you can ask the Alliance Healthcare & Boots Pensions Department to send you a form.

Why should I fill out this form?

1. Lump sum death benefit – life assurance

The lump sum death benefit is set up under a discretionary Trust, which means it is not currently subject to inheritance tax or income tax. As it is set up this way, the Trustees must decide who will receive the benefit if you die. The Nomination of Beneficiary Form helps the Trustees make this decision as they must pay the benefit.

In completing this form, you will be giving the Trustees clear guidance as to whom you wish to receive some or all of the benefit. The Trustees will normally follow your wishes as set out on the form, but they will also consider the circumstances at the time of your death.

Although you may have a Will which sets out who should benefit from your Estate in the event of your death, the value of the lump sum death benefit from the AHBRSP is not included as part of your Estate.

2. Return of your investments with Legal & General

If you do not complete part 2 of the form, any return of your investments upon your death will automatically be paid to your Estate and, depending on your circumstances, may be subject to inheritance tax. This form will give clear guidance to Legal & General, as to whom you wish to receive your returned investments. This will also avoid delays in paying this element of your death benefits.

If you make a nomination, Legal & General will pay the lump sum at its discretion to the person(s) you nominate and/or your Estate.



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