

# Worksave Pension Plan

## Expression of Wish Form

Only to be completed by employees entitled to Death in Service benefits under a policy with the AA Life Assurance Trust or any successor Scheme. Before completing this form please read the notes on the reverse of this page carefully. To be completed in BLOCK CAPITALS.

### PERSONAL DETAILS

<b>Title</b>	<b>Family Name</b>	<b>First name</b>
<b>Payroll no.</b>	<b>National Insurance no.</b>	
<b>Email address</b>		

### Nomination for Lump Sum Beneficiaries

<b>1st Nominee (full name)</b>		<b>Relationship</b>
Address		
Postcode	Date of birth	Proportion of benefit

<b>2nd Nominee (full name)</b>		<b>Relationship</b>
Address		
Postcode	Date of birth	Proportion of benefit

<b>3rd Nominee (full name)</b>		<b>Relationship</b>
Address		
Postcode	Date of birth	Proportion of benefit

<b>4th Nominee (full name)</b>		<b>Relationship</b>
Address		
Postcode	Date of birth	Proportion of benefit

Please include below, further information which may help the Trustee carry out your wishes. If you wish to make additional nominations or provide further information to help the Trustee, please continue on a separate sheet and attach it to this page.

<b>Signature</b>	<b>Date</b>
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*I request the Trustee considers paying any lump sum payable in the event of my death to the person(s) nominated by me above in the proportion(s) shown. I consent to the processing of personal data under the terms of the Data Protection Act 1998 (see note 10).  
**This form cancels any previous Expression of Wish form completed by me in relation to this life assurance Trust.***

# Notes

## Nomination for Lump Sum Beneficiaries

1. Lump sum benefits are payable on the death of an employee covered under the employer's Group Life Assurance policy.

The Rules provide that the Trustee should have discretion with regard to the distribution of the lump sum benefit. However, it is helpful for the Trustee if you use this form to inform it of your wishes which, although not binding, will be taken into account when they decide how to distribute the lump sum death benefit over which it has discretion.

2. You may nominate any natural person as a beneficiary to receive all or part of your lump sum benefit. You may nominate charities, societies or clubs but you MAY NOT nominate any non-persons such as animals. You may nominate your 'estate' but please note that in this case any amount agreed to be paid by the Trustee may be included as part of your estate and may be subject to inheritance Tax. *(see also 3 below)*

**Note:** if children under 18 years of age are nominated, the Trustee may decide to pay the benefit into a trust for their benefit. *(see also 3 below)*

3. It is suggested that before making your nomination you consider taking professional, legal, financial and/or tax advice in relation to the death benefit and the disposition of your personal estate on your death.
4. It is not possible to use any prospective lump sum as security for any form of loan including a mortgage.
5. This expression of wish form will be treated in confidence. It can be withdrawn at any time or a new one submitted to supersede it. Please note though that the Trustee will not accept irrevocable nominations and nominations in sealed envelopes will be electronically scanned on receipt.
6. After making your nomination, it is recommended that you review it periodically, in particular when your circumstances change, especially if marriage or separation/divorce occurs. New forms can be

obtained from the Pensions Department.

7. Once you have completed this form please send it to the Trustee at the address below. You should keep a copy for your own records.
8. If you are a member of the GPPP, you must also record a beneficiary for any benefits payable from that Plan. Any beneficiary nomination recorded on this form will not be disclosed to the provider of the GPPP.
9. Completion of this form does not create any entitlement to benefits.

## 10. Data Protection Act 1998

The Trustee will hold personal data provided by you (and, where appropriate, by third parties such as your employer) for the purpose of calculating and providing your benefits and your dependants' benefits under the AA Life Assurance Trust.

The Trustees may make this information available to others (within the United Kingdom or in any other country) where they think it is necessary or desirable to do so in connection with the administration of the scheme. In particular, the Trustee may make the information available to its professional advisers and to any other persons who may become responsible for providing benefits.

Where information is made available outside of the European Economic Area ("EEA"), laws and practices relating to the protection of personal data may differ from those within the EEA and may offer a different level of protection (or no protection) for personal data.

Sensitive personal information, such as medical reports and Expression of Wish forms, will remain confidential and will be disclosed only when the Trustee considers it appropriate to do so.

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*Please return this form to:*

**The AA Pensions Department**  
**Fanum House**  
**Basing View**  
**Basingstoke**  
**RG21 4EA**