

LUMP SUM ON DEATH NOMINATION

Information notes – please detach and retain

If you are a member of the National Health Service Pension Scheme (Scotland) (NHSPS(S)), or the Scottish Teachers' Pension Scheme (STPS), the regulations provide benefits on death.

In the event of your death, benefits will (on application) be paid to your:

- spouse or
- civil partner or
- nominated partner.

However, if you do not wish any of the above to receive death benefits, you also have the option to make a specific nomination.

NHS members can request that a nomination be made to either:

- a) an individual or individuals, or
- b) a personal representative, or
- c) a corporate or unincorporated body.

However, you cannot have a combination of the above.

STPS members can only request that a nomination be made to an individual or individuals.

If you have no spouse/civil partner/nominated partner when you die and you have not made a nomination, the lump sum will be paid to your legal personal representative, will form part of your estate and may be subject to inheritance tax.

If you have nominated two or more individuals to receive the lump sum, you should specify the exact proportion that each individual is to receive. This should be expressed as a whole percentage and must total 100%.

If your nominee dies, the designated proportion of the lump sum that is due to them will be paid to your personal representative. It is therefore, in your interest to ensure that you submit a fresh nomination form when there are any changes.

You should ensure that we are advised of any change in your nominee's contact details and it is your responsibility to ensure that all nominees are aware of the terms of the nomination.

Nominations can be revoked at any time and if you wish to revoke or change your nomination, please notify us. This will supersede any previous nominations made.

If you are currently a member of both NHS and STPS, please complete two separate forms.

We will acknowledge receipt of your application using the email address supplied. We will not under any circumstances supply this to another party.

Personal checklist

You should note on this checklist the date that you forwarded your application to SPPA.

Reference no:

NHSPS(S)

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STPS

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Date sent:

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If any of the details change, please advise us immediately.

The address is: Scottish Public Pensions Agency
 7 Tweedside Park
 Tweedbank
 Galashiels
 TD1 3TE

You can telephone 01896 893000. Please have your reference number ready.

Email contact information can be found on our website at – www.sppa.gov.uk

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SECTION 1. PERSONAL DETAILS

Superannuation no: NHSPS(S) STPS

Surname

Former surname (if applicable)

Forenames (in full)

Title
 Mr Ms Mrs Miss Dr

Other (please specify)

Date of birth (e.g. 15/04/1943)
 / /

Contact address

Postcode

National Insurance number

Email address

Telephone number

SECTION 2. NOMINATION DETAILS

I nominate the following individual(s) to receive, in the proportion shown, the lump sum which may be payable under scheme regulations:

Please tick relevant box
 NHSPS(S) STPS

Name	Date of birth	Address	Percentage
			%
			%
			%
			%
			%
			%

This must total 100% and be expressed as whole numbers e.g. (45% + 55% = 100%)
 If you have more than six nominated individuals, please attach an additional sheet detailing the relevant information.

Member's signature

Date

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SECTION 3 – WITNESS DETAILS

A witness cannot be a relative or nominee and must be present at the time of member's signing.

Witness name

Contact address

Postcode

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Witness signature

Date

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Please return this form to SPPA, 7 Tweedside Park, Tweedbank, Galashiels, TD1 3TE