



University of Edinburgh Staff Benefits Scheme Expression of Wish Form

PLEASE READ the notes overleaf, including how the Trustee will use your data, before completing this form.

Surname _____
(BLOCK CAPITAL LETTERS)

First name(s) _____ Mr/Mrs/Miss/Ms _____
(BLOCK CAPITAL LETTERS) (TITLE)

National Insurance Number _____

Date of Birth _____

I wish to nominate the person, charity or organisation(s) named below to receive any **lump sum** that may be payable following my death.

I acknowledge that the Trustee retains absolute discretion in determining the distribution of any lump sum death benefit, although my expressed wishes will be considered.

Beneficiaries

Name:	Percentage	%
Address:		
Relationship (if any):		
Name:	Percentage	%
Address:		
Relationship (if any):		
Name:	Percentage	%
Address:		
Relationship (if any):		
Name:	Percentage	%
Address:		
Relationship (if any):		

Declaration

I understand that this form is not legally binding but will be considered by the Trustee when exercising its discretion over any lump sum death benefits. I confirm that the information I have provided is accurate to the best of my knowledge.

Signature: _____

Date: _____

Please return this form to:

The Trustee of the University of Edinburgh Staff Benefits Scheme
c/o Hymans Robertson LLP
20 Waterloo Street
Glasgow
G2 6DB

Alternatively, you can email the team at UoE@hymans.co.uk.

Notes and Data Protection

- 1 Any data you provide will be kept in accordance with UK Data Protection laws. For more details, please see the Scheme's Privacy Notice by accessing the following link <https://www.uoesbspensions.co.uk/resources/privacy-statement/>
- 2 Under current legislation, any Lump Sum Death Benefit ("LSDB") may be paid at the discretion of the Trustee directly to your beneficiaries, free of tax. Beneficiaries are defined in the Scheme Rules and may include your relatives and dependants, an organisation or charity(ies) of your choice.
- 3 You should inform the Trustee of your chosen beneficiary(ies) by completing the form above. While the Trustee will give full consideration to your wishes when paying any LSDB, please note that your nomination is not legally binding.
- 4 The form provides space for up to four nominations, but there is no limit on the number of people, charities or organisations you may nominate. If you wish to nominate more, please write to the Trustee. Please ensure that the proportions you allocate add up to 100%.
- 5 If you do not inform the Trustee of your preferred beneficiaries, any LSDB can only be paid to a relative, someone who was financially dependent on or interdependent with you, or a person nominated in your will.

Updating your personal information

PRISM is your personal pension portal, giving you instant access to all your Scheme information. You can view and update your personal information, contact preferences, update your nominated beneficiaries, and submit general enquiries at a time that suits you. There's also more you can do depending on where you are on your pension journey.

You may change your nomination at any time, and you should ensure that details of your beneficiaries are kept up to date. If you have registered for the Scheme's online portal (PRISM) and you would prefer to update your nominations digitally, then please do so via the Scheme's website:

<https://uoesbspensions.co.uk/>

Not yet registered? Scan the QR code to get started:

