



EXPRESSION OF WISH - DISPOSAL OF DEATH BENEFIT

1. DETAILS

Please provide details of those people you would like to receive any benefit payable under the Scheme on your death, and sign and date the Declaration.

This Expression of Wish does not bind the Trustee of the Scheme, but will help the Trustee to pay out benefits in line with your wishes.

The Expression of Wish can be changed in writing at any time.

1.

Name:	<input type="text"/>
Address	<input type="text"/>
	<input type="text"/>
	<input type="text" value="Post Code:"/>
Date of Birth:	<input type="text"/>
Relationship:	<input type="text"/>
% of Benefit:	<input type="text"/>

2.

Name:	<input type="text"/>
Address:	<input type="text"/>
	<input type="text"/>
	<input type="text" value="Post Code:"/>
Date of Birth:	<input type="text"/>
Relationship:	<input type="text"/>
% of Benefit:	<input type="text"/>

3.

Name:	<input type="text"/>
Address:	<input type="text"/>
	<input type="text"/>
	<input type="text" value="Post Code:"/>
Date of Birth:	<input type="text"/>
Relationship:	<input type="text"/>
% of Benefit:	<input type="text"/>

4.

Name:	<input type="text"/>
Address:	<input type="text"/>
	<input type="text"/>
	<input type="text" value="Post Code:"/>
Date of Birth:	<input type="text"/>
Relationship:	<input type="text"/>
% of Benefit:	<input type="text"/>



EXPRESSION OF WISH - DISPOSAL OF DEATH BENEFIT

2. TRUST NOMINATION

Name of Trust:

Address where Trust is held:

Name of Trustees:

 Post Code:

Date of Trust:

PLEASE NOTE:

- In the event of death, InvestAcc Limited will require written confirmation from the above named Trustee(s) confirming the arrangement is subject to a Trust as mentioned in the Scheme Rules.
- Payment to the Trust will be made at the discretion of Investacc Limited in accordance with the Scheme Rules.
- InvestAcc Limited are not Trust experts and cannot be held responsible for ensuring a Trust fulfils the purposes for which it was intended.

3. YOUR DECLARATION

I understand that InvestAcc Limited will assume that where I have disclosed information about another person I have:

- Obtained their consent to disclose such information, and
- Informed them of the purposes for which their information will be processed.

Name of Member:

Member Number:

Signature:

Date:

InvestAcc Limited, 21 Castle Street, Carlisle, Cumbria, CA3 8SY
T: 01228538988 - F: 01228535988 - E: info@investacc.co.uk
InvestAcc Limited is authorised and regulated by the Financial Services Authority
InvestAcc Ltd is Registered in England and Wales Company No 2719226