

## EXPRESSION OF WISH FORM

### MEMBER DETAILS

Your Full Name: \_\_\_\_\_ Staff Number: \_\_\_\_\_

The purpose of this form is to enable you to express your wishes with regard to the payment of any lump sum death benefits from the Fund. The Trustees of ULPF have discretion under the Fund's discretionary trusts in determining who is to receive the lump sum.

### BENEFICIARY OR BENEFICIARIES

I wish the Trustees to consider paying any lump sum death benefits to the following person(s). If you wish to name more than one person, please state the percentage for each person. If you wish to nominate more than four persons, please enclose a separate letter with this form.

FULL NAMES	RELATIONSHIP TO ME	PERCENTAGE OF BENEFIT

### ALTERNATIVE WISHES

If the above (or any of them) predecease me I wish the trustees to consider the following:

### DECLARATION

I wish the above to be considered as possible recipients of any lump sum payable on my death at the discretion of the Trustees of the University of Liverpool Pension Fund under the Fund's discretionary trusts and where more than one person is named by me above in the proportions indicated. I confirm that I understand that the trustees can take this expression of wish form into account when deciding how to exercise its discretionary powers, but is not legally bound to do so. This supersedes any previous expression of wish form signed by me.

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

### **PLEASE ENSURE YOUR FORM IS WITNESSED**

(Please note the witness must not be one of the named beneficiaries)

Witnessed by Full Name: \_\_\_\_\_

Address: \_\_\_\_\_

Signature of Witness: \_\_\_\_\_ Date: \_\_\_\_\_

## DATA PROTECTION

### Using your personal information

The Trustee collects personal information about you and uses this to calculate and pay your benefits under the ULPF and to administer ULPF as a whole. The Trustee is required to keep this information secure and to process it in accordance with the data protection laws.

The Trustee may share your information with the University of Liverpool and third parties in relation to the administration of ULPF, including professional advisers and other service providers. However, it will not be shared with third parties for marketing purposes.

Further details about how your personal information is collected and used are included in the ULPF Privacy Notice which can be found at [www.liverpool.ac.uk/hr/pensions/ulpf/documents](http://www.liverpool.ac.uk/hr/pensions/ulpf/documents).

## DEFINITIONS

**DISCRETIONARY TRUSTS** means that, in regard to any sum directed to be held on them in respect of a deceased member:-

- (a) the trustees have power, at their discretion, to pay or apply the whole or any part of that sum to or for the benefit of all or any of the relatives, dependants, personal representatives or nominated beneficiaries or statutory next of kin of such deceased member or any beneficiary of the deceased person in such shares and proportions as the trustees in their absolute discretion decide but so that, if the member does not leave any relative or dependant, the trustees may elect to retain all or any part of the sum as part of the fund; and without prejudice to the generality of the foregoing power, the trustees have power to declare in respect of any sum or part thereof such separate trusts terms and limitations including such provisions for maintenance, education, advancement and accumulation of income during a minority, and including such discretionary trusts and powers, as the trustees shall from time to time by deed revocable or irrevocable appoint, but without infringing the rule against perpetuities, and the trustees have power to appoint as trustees of such fund any two persons or a trust corporation as the trustees shall in their absolute discretion decide and to remove any of such trustees and appoint any other trustee in place of any one so removed and provide for the remuneration of any such appointee;
- (b) if or to the extent that the trustees shall not exercise the powers contained in paragraph (a) hereof within two years of the death of a member, the trustees shall hold such sum as a separate fund from the fund constituted hereunder upon trust for the personal representatives of the deceased member or, if there are none, the statutory next of kin of the deceased member;
- (c) the trustees may, but without being in any way bound to do so, have regard to any document signed by the member concerned expressing his wishes relating to the disposal of any sum to be held upon the discretionary trusts, and may issue forms to members for the purpose, and so that for the purposes of this definition any person named in such expression of wish who is not a relative or dependant of the member shall be a "nominated beneficiary";
- (d) notwithstanding the provisions of this definition the trustees shall be entitled to recover out of any payment to which this definition applies any sums due to the trustees by way of arrears of contribution at the date of death.

**DEPENDANT** means, in relation to any member, any individual (whether or not a relative) who, in the opinion of the trustees, is or was at the time of such member's death wholly or partly dependent upon him;

**RELATIVE** means and includes in relation to any deceased member:-

- (a) the widow or widower of the member,
- (b) the father or mother (whether lawful or adoptive) of the member and the widow or widower of such father or mother.
- (c) any person (except such member) who is the child or remoter issue (whether lawful or adoptive) of such father or mother or grandparents, and the spouse or widow or widower of any such person, and
- (d) any person who has been the wife or husband of the member.