



Flexible Retirement Plan

Lump Sum Death Benefits Form

Completion of this form will enable your organisation to include a Lump Sum Death Benefit within the Flexible Retirement Plan operated by The Pensions Trust for your employees.

EMPLOYER'S DECLARATION

Employer Reference Number

To the Board of Trustees of The Pensions Trust

WE _____ (name of organisation) hereby apply to introduce a Lump Sum Death Benefit for our members participating in the Flexible Retirement Plan as from ____/____/____. The amount of death benefit is requested below.

WE hereby undertake and agree to observe and perform all of the provisions of the Trust Deed and Rules.

Additionally, we undertake to advise the Trustees immediately, in writing, if we wish to cease this benefit.

WE understand that we will be required to submit contributions and data in a format acceptable to The Pensions Trust.

WE also understand that it is our responsibility to advise our members if we intend to offer a Lump Sum Death Benefit within the Flexible Retirement Plan.

WE further understand that life assurance cover is provided on the basis that members are not seconded to a country that is classified as a "dangerous territory" and therefore a member may not be covered for life assurance should death occur whilst the member is abroad. Further information on the countries classified as dangerous territories can be found on the Foreign & Commonwealth Office website www.fco.gov.uk/en

Lump Sum Death Benefits

WE require the following Lump Sum Death Benefit to apply to all members: _____ multiple of salary and/or £ _____ (fixed amount).

Signed: _____ **Date:** ____/____/____

Full Name: _____

Position: _____

Employer Address: _____

_____ **Postcode:** _____

Telephone Number: _____

The completed form should be sent to the Flexible Retirement Plan Team at the appropriate address below. Any queries please call 0113 394 2765 or email frp@thepensionstrust.org.uk

The information on this form will be treated in the strictest confidence.
Personal data which is held will be processed in line with the Data Protection Act 1998.
The Data Controller is Verity Trustees Ltd.