



Important information

If you've received a letter from us regarding the wind-up of the Master Trust pension scheme, you should complete the Declaration of Trust and Expression of Wish form enclosed with your letter. Please do not complete this Expression of Wish form.

Full Name:	Plan Number:
National Insurance Number:	Date of Birth:

COUNTRYWIDE ASSURED

EXPRESSION OF WISH FORM

Your Pension Plan is held under a discretionary trust, the Trustees of which are the Directors of Countrywide Assured Trustee Company Ltd. This means that in the event of your death, the Trustees choose who the lump sum benefits are payable to.

As the beneficiaries are chosen by the Trustees, any lump sum benefits payable by the Trustees will normally fall outside your estate and will not be liable for Inheritance Tax. To ensure we hold details of your wishes, please complete the form on the next page and return it as soon as possible to Countrywide Assured.

This form allows you to make an expression of wish to the Trustees indicating who you would prefer to benefit in the event of your death. This expression of wish applies to any lump sum paid in respect of your plan. Such an expression is considered by the Trustees when they actually decide who to pay.

Please remember that the onus is on you to keep your nomination up to date. If you change your mind, or, a nominated beneficiary predeceases you, you should complete and return another nomination form.

Notes:

If you wish to include further beneficiaries, please add them on a separate sheet of paper. This should be signed and dated and then returned with this form.

The Trustees of the Scheme have total discretion on who any lump sum death benefits are payable to e.g. a surviving spouse, civil partner, children, dependants, relatives or nominated beneficiaries. In practice, benefits are normally paid in accordance with an up to date Expression of Wish, if one exists.

The above information is based on our understanding of the law at present. We are unable to give any guarantee as to the eventual Inheritance Tax position and you are advised to consult your own legal and financial advisers if you are in any doubt as to what to do about this form.

If you have any questions on the completion of this form, please contact us.

Expression of Wish

In the event of my death, I request that the Trustees pay any lump sum death benefit to the beneficiaries listed below.

I understand that this instruction is an 'expression of wish' which does not in any way restrict the absolute discretion of the Trustees and is not a binding instruction. I also understand that this form may be revoked or revised by me at any time.

1. FULL NAME		ADDRESS (including postcode)
PROPORTION %	RELATIONSHIP	
2. FULL NAME		ADDRESS (including postcode)
PROPORTION %	RELATIONSHIP	
3. FULL NAME		ADDRESS (including postcode)
PROPORTION %	RELATIONSHIP	
4. FULL NAME		ADDRESS (including postcode)
PROPORTION %	RELATIONSHIP	

Must equal 100%

Full name:	Signature:	Date:
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It's important to include your signature as proof of your request because protecting our customers from potential fraud is something we take very seriously.

There are three possible ways to add your signature.

Option 1 – Got a printer?

Add your signature to your printed form(s). You can either scan or take a photo of your paperwork.

Option 2 – No printer?

Complete your form(s) online and scan or photo of a handwritten letter asking us to accept your form(s).

Please make sure your signature appears clearly on your handwritten letter.

Option 3 – Add an electronic signature to your form(s)

If you can add your signature to your form(s) using a digital pen on the screen, find the Adobe PDF Fill & Sign' feature to draw and add your signature.

Telephone calls may be monitored and/or recorded to enable us to improve our service to you.

Countrywide Assured plc. Registered in England No. 2261746. Registered Office: 2nd Floor, 33-34 Winckley Square, Preston, Lancashire, PR1 3JJ, United Kingdom.

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