

Network Rail CARE Pension Scheme (“CARE Scheme”)

Expression of Wish Form

In the event of your death, the Trustee has discretion in the allocation of any lump sum benefit arising under the Rules of the CARE Scheme. Please use this form to indicate your wishes to the Trustee. Please use BLOCK CAPITALS.

1. Your personal details

Mr/Mrs/Miss/Other:	First name(s):	Surname:
Address:		
Date of birth: / /	National Insurance Number:	

2. To the Trustee

I understand that the application of any lump sum benefit arising on my death is at the complete discretion of the Trustee. I should, however, like the Trustee to consider the person or persons named below as possible recipients of the lump sum benefit, in the percentage(s) shown below, due on my death.

Please ensure that the total percentages add up to 100%

Name of Beneficiary	Address	Relationship	Date of Birth	% of Benefit
			/ /	
			/ /	
			/ /	
			/ /	

If you would like to nominate more than four beneficiaries, please use an additional sheet of paper and attach it to this form when returning. Please sign and date the additional sheet.

3. Dependant’s pension

Please write in the box below the details of the person you would like the Trustee to consider paying a pension to, should you die. This should be taken into account when choosing beneficiaries for the lump sum.

Name of Dependant:	Address:	Relationship:
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4. Notes

- The Trustee is not legally bound by your nomination(s) but will take your wishes into consideration.
- Under legislation in place in October 2015, lump sum death benefits can be paid at the discretion of the Trustee direct to the person(s) or charities that you nominate without any tax liability.
- You may request that any lump sum is payable to ‘your estate’, but there may be a tax liability.
- If you nominate a child under the age of 18, an adult must receive the lump sum death benefit on their behalf. You should provide the name and address of the adult who will act for the child.
- You can change your nomination(s) at any time by completing and returning a new Expression of Wish form.

5. Data protection statement

The Trustee of the CARE Scheme, Network Rail Infrastructure Limited and the third party administrator (currently Willis Towers Watson) will use information about you to arrange and administer your entitlements (and entitlements in respect of you) from the CARE Scheme. Your personal information will be held in accordance with the Data Protection Act 1998. All the information requested will be treated as confidential and the details will be used only for administering your pension and dependants’ benefits; this may include sharing your information between us and disclosure to our advisers and service providers but only where it is necessary as part of providing your pension scheme benefits. We may disclose your personal information if required to do so by any legal, regulatory or statutory bodies such as HM Revenue & Customs.

Signed:	Date:
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Please return your completed form to: Network Rail CARE Pension Scheme, Sunderland, SR43 4JU or email to NetworkRailPensions@wtwco.com.

If you do not receive an acknowledgment within 28 days please telephone Willis Towers Watson on 01737 230487.