

# Dependant's pension nomination form – Section C

The Trustee may pay a pension to one of your dependants if, when you die, you:

- Have completed at least two years' *qualifying service*;
- Are not married to or in a civil partnership with any person; and
- Financially support someone.

It will help the Trustee to make a decision if you complete this nomination form. However, your dependant will still be eligible to be considered for a pension if you do not complete the form.

After your death (and never before then), the person you have nominated will be asked to provide information about their dependency on you and the Trustee will decide whether or not they are eligible for the pension, and if a pension should be paid. If the Trustee decides that a pension is to be paid, your dependant will be contacted and advised of how long the pension will be paid for, and of any terms applying to it.

**Before completing this form, please read the notes overleaf.**

## 1. Personal details (please complete in BLOCK CAPITALS)

Full name	
Date of birth	
NI number	
Home address	
Postcode	

## 2. To the Trustee

In the event of my death, I would like to nominate the following individual, who is dependent on me, to be considered for a dependant's pension.

Full name	
Home address	
Relationship	

I declare that the individual named is wholly or partially dependent on me.

Signed	
Date	

**Please return to:**

**Pensions Service Centre, PO Box 500, CHESTERFIELD, S49 1WX**

# Notes on making a dependant's pension nomination

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## Q Who can I nominate to receive a dependant's pension?

The person you nominate must be financially dependent on you in some way immediately before your death. This will normally be someone who is living with you. Examples of people who may be considered for a dependant's pension are:

- A long-term partner (who you are neither married to nor in a civil partnership with);
- A relative who cannot support themselves because of physical or mental ill health; or
- Your full-time carer.

**Please note:** Current tax laws may prevent the payment of a dependant's pension to your son or daughter aged over 23. Please contact the Pensions Service Centre for further information, if needed.

## Q What does 'financially dependent' mean?

A person would normally be financially dependent on you if:

- They share living expenses with you; or
- Receive financial support from you; and
- Their standard of living would be affected by the loss of your contribution or support.

## Q How much will a dependant's pension be?

A dependant's pension is normally equal to a widow(er)'s pension. That is, half of your pension (excluding any *pension supplement*) before any of the pension is exchanged for a lump sum.

**Please note:** The Trustee may pay a pension of a smaller amount and may reduce or stop a dependant's pension at any time. Normally, the Trustee will pay only one dependant but if more than one is chosen, the Trustee will decide how the pension is to be shared, taking into account the dependants' circumstances at the time of your death.

## Q How can I nominate someone?

You should complete the 'Dependant's pension nomination' form overleaf and return it to the Pensions Service Centre. If you need help in completing the form you can:

- Phone the Pensions Service Centre on Postline **5456 4545** or **0114 241 4545** – please have a pen and paper ready; or
- E-mail them, either via [pensions.helpline@royalmail.com](mailto:pensions.helpline@royalmail.com) or via the website at [www.royalmailpensionplan.co.uk](http://www.royalmailpensionplan.co.uk).

Please quote your full name, date of birth and either your National Insurance number or your Plan membership number.

## Q Can I change my nomination?

To withdraw your nomination you must write to the address overleaf, quoting your full name, date of birth and either your National Insurance number or Plan membership number. If you simply want to change your nomination you will need to complete a new form, which can be downloaded at [www.royalmailpensionplan.co.uk](http://www.royalmailpensionplan.co.uk) or is available on request from the Pensions Service Centre (PSC).

**Please note:** Your nomination may be disregarded if your personal circumstances have changed significantly since it was last completed. You should therefore ensure your nomination form is kept up to date with your wishes.

## Data Protection Act

The Trustee of the Plan and its advisers and administrators (as detailed in the Annual Plan Report and Accounts), will need to process certain data about you:

- To calculate and pay benefits;
- For statistical purposes;
- For reference purposes; and
- To administer the Plan as a whole.

This may include 'sensitive' data, such as medical details or information about your nominee(s) for death benefit nominations, dependant's pensions etc. Where 'sensitive' data is to be processed, you will need to confirm in writing (by signing the relevant nomination and/or direction forms) that you, and your nominee(s), agree to the processing of this data for these purposes and that the data may be shared with the Plan administrators, the *Company*, the Plan *Actuary*, the Plan advisers and other third parties, as may be necessary.