

HOW TO USE THIS TEMPLATE

1. Complete Part A (your details) and Part B (your pension details) first.
2. Complete one Beneficiary Block for each person you wish to nominate.
3. Complete Part D — your expression of wishes — in your own words.
4. Sign Part E in front of a witness. The witness must be over 18 and not a named beneficiary.
5. Send this letter to your pension provider by recorded post AND email. Keep a copy.
6. Ask the provider to confirm receipt and update your records in writing.
7. Review this nomination every 2–3 years or whenever your circumstances change.

[Your Full Name]

[Your Address Line 1]

[Address Line 2]

[Town / City]

[Postcode]

[Your Email Address]

[Your Phone Number]

[Date]

Pension Administration Team

[Pension Provider Name]

[Provider Address / Email]

Re: Nomination of Beneficiary and Expression of Wishes — Policy / Scheme Reference: [Policy or Scheme Reference Number]