

The Cardiff and Vale of Glamorgan Pension Fund
 Local Government Pension Scheme Regulations
Death Grant Nomination Form

1. PERSONAL DETAILS– Please complete in block capitals

Surname: Title:

Forenames:

Address:

DOB: Marital Status N.I. No:

Employer: Date started work:

Name: Total to equal 100%

Address: %

Relationship to you (if any):

Date of Birth (if under age 18):

Name: Total to equal 100%

Address: %

Relationship to you (if any):

Date of Birth (if under age 18):

Name: Total to equal 100%

Address: %

Relationship to you (if any):

Date of Birth (if under age 18):

I understand that the above is an indication of my wishes, which I may alter at any time. I acknowledge that you are not bound to act in accordance with my wishes. Without creating any trust, or binding obligation, and without overriding in anyway your discretion, I request that you take note of my wishes.

Sign: Date:

Information collected using this form will be processed by, or on behalf of, the Cardiff and Vale of Glamorgan Pension Fund, for the purposes of administering the scheme. Further details can be found in our data protection notice, available on the website. Where you have provided us with personal data about other individuals, such as family members, dependants or potential beneficiaries under the Fund, please ensure that those individuals are aware of the information contained within this notice.

The Cardiff and Vale of Glamorgan Pension Fund Local Government Pension Scheme Regulations Death Grant Nomination Form

1. If a lump sum is payable on your death, your Death Nomination Form tells the Scheme Managers know who you would like to receive the money.
2. The Scheme Managers cannot be legally bound by a nomination, and must retain absolute discretion as to the payment of a death grant. However, they will make their decision taking your wishes into account.
3. You can nominate any person, organisation or charity and the money can be divided as many ways as you like, but please remember that the total needs to add up to 100%. We are unable to accept a nomination that substitutes one nominee for another i.e. in the event of nominee 'A' dying, I wish to nominate nominee 'B'.
4. The advantage of completing a nomination form, means we can pay the death grant quickly without waiting for the Estate to be settled, and usually without any liability to Inheritance Tax.
5. A nomination will become invalid if any of the following circumstances apply at the time of your death:
 - The nominee has died
 - The nominee was your spouse, civil partner or cohabiting partner at the time of the nomination (or later), but is not at the date of your death
 - The nomination has been cancelled by you, or replaced by a newer Death Nomination Grant form
 - If the Scheme Managers of the Pension Fund decide it is not reasonable, or justified to make a payment to a nominee
6. Please take a copy of your completed Death Grant Nomination Form and these notes, and keep in a safe place.
7. You can update your nomination form at any time, but each new form we receive, replaces all previous nomination forms. If you wish to change your nomination in the future, please contact the Pensions Team on telephone 029 2087 2334 or email pensions@cardiff.gov.uk .
8. This form only tells us your wishes on how you would like us to pay your death payment from Cardiff and Vale of Glamorgan Pension Fund. Please consider making a Will to ensure the rest of your finances are distributed as per your wishes. To avoid confusion, please reference within your Will that the death grant will be paid in accordance with your Death Grant Nomination.

Please return this form to:

Cardiff Council, Pensions Team, Room 252, County Hall, Cardiff. CF10 4UW