

SECTION A: personal details

PLEASE USE CAPITAL LETTERS

Surname	Title
First names	
Cheviot membership number	

SECTION B: expression of wishes

By completing this form, the Trustee will be able to take your wishes into consideration when distributing any lump sum payable on your death. This form is not binding on the Trustee. As payments are made at the discretion of the Trustee, they are not subject to inheritance tax under current legislation. The range of permissible beneficiaries is very wide and includes your spouse, civil partner, children, dependants, and any other relative, person or bodies, e.g. charitable organisations. You can change your mind at any time by completing a new form.

I wish the Trustee to consider the person or persons named below as possible beneficiaries of any lump sum benefits that are payable on my death. I understand that this form supersedes any previous Expression of Wishes Form or Nomination Form.

1

Surname	
First names	
Home address	
Relationship	Proportion of benefit <input type="text"/> %

2

Surname	
First names	
Home address	
Relationship	Proportion of benefit <input type="text"/> %

3

Proportion of benefit

%

4

Proportion of benefit

%

If you wish to add further beneficiaries use another form.

Total

Please specify whole percentages only

I acknowledge that the information on this form is held and processed by The Cheviot Trust, my employer and organisation providing services for the purposes of administering the scheme, in accordance with the Data Protection Act 2018 and the General Data Protection Regulation. I acknowledge that as a result of that Act there is a possibility that the information contained in this form could be disclosed to the beneficiaries named above.

Further details about how we use your personal data can be found in our Privacy policy which is available at www.cheviottrust.com/privacypolicy

PLEASE COMPLETE THIS FORM AND RETURN TO US BELOW:

E. people@cheviottrust.com www.cheviottrust.com

Kingswood House, 58-64 Baxter Avenue, Southend-on-Sea, Essex SS2 6BG **T.** 01702 354024 | **F.** 01702 354364

TRUSTEE: CHEVIOT TRUSTEES LIMITED. REGISTERED IN ENGLAND AT THE ABOVE ADDRESS. REGISTERED NUMBER 5396879.