

# Relevant Life Mastertrust Expression of Wish

A benefit is paid if you were to die while you're included in the Relevant Life Mastertrust scheme. The trustees will decide who to pay your benefit to. When they decide they'll consider your circumstances at the time of your death, and your wishes recorded on this form.

Please fill in this form to tell the trustees who you'd like to receive your benefit. You'll need to give your completed form to your employer for safekeeping.

If you want to update your expression of wish, please fill in a new form and give it to your employer.

Please speak to your employer if you have any questions.

## 1. About you

Your full name

Your date of birth

National insurance number

Who is your employer?


## 2. Who would you like the trustees to pay benefit to?

Person 1

Mr/Mrs/Miss/Ms/Other

Full name

Relationship to me

Address

Postcode

Date of birth

Percentage of any  
payment due


▮ If you want the benefit to be paid to more than one person, please make sure the percentages total 100%.

## 2. Who would you like the trustees to pay benefit to? – continued

### Person 2

Mr/Mrs/Miss/Ms/Other

Full name

Relationship to me

Address

Postcode

Date of birth

Percentage of any payment due

%

### Person 3

Mr/Mrs/Miss/Ms/Other

Full name

Relationship to me

Address

Postcode

Date of birth

Percentage of any payment due

%

If you want the trustees to consider more people, please give their details on a separate piece of paper and attach it to this form.

## 3. Your confirmation

I'd like the trustees to consider the nominations for benefit made in this form. This expression of wish replaces any previously made by me.

Signature

X

Date

**Please sign the completed form and give it to your employer.**

## 4. Tax information

The information we've given below is based on our understanding of current tax rules that may change.

To secure tax advantages the benefit is paid through a discretionary trust, usually free of any tax deductions.

- There are two types of tax charges that could apply to the benefit if it's paid, a 'periodic charge' and an 'exit charge'. It's unusual for either to apply, however if they do, each charge will not exceed 6% of the benefit value. The trustees will work out and deduct the tax from the benefit before it's paid to your relatives, dependants or chosen charities.

As part of any inheritance tax planning, please talk to your tax adviser about your inclusion within the Relevant Life Policy Mastertrust. In some circumstances the cost of the insurance cover could be considered part of your transferable nil rate band.

**Legal & General Assurance Society Limited**

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