

# Nominate your beneficiary

Please complete this form to tell us who you would like us to consider making payment(s) to should you die before taking your retirement benefits.

**You can also update details of your beneficiaries online at [legalandgeneral.com/mya](https://legalandgeneral.com/mya)**

Our standard process means that we would not need to see evidence that probate had been applied for or deal with the executor of your estate as a matter of course.

Legal & General has sole discretion as to whom payment is made. However we'll take your wishes into account.

You'll find full details about benefits and options on death in your Member's Booklet.

## Important information

The personal information collected from you will be shared with fraud prevention agencies to prevent fraud and money laundering and to verify your identity. If fraud is detected, you could be refused certain services, finance, or employment. Further details of how your information will be used by us and these fraud prevention agencies, and your data protection rights, can be found on [legalandgeneral.com/cifas](https://legalandgeneral.com/cifas)

## IMPORTANT

**Please do not send this form back to us until you know your pension plan number. This number will be on the documentation we'll send you in the post once we've received your first pension contribution. If you do already know your pension plan number, please write this in the box provided in section 1 'About you' below.**

## Part 1 – About you

Your full name	<input type="text"/>									
Your date of birth (DD/MM/YYYY)	<table><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y	
D	D	M	M	Y	Y	Y	Y			
National Insurance number	<table><tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>									
Pension plan number	<input type="text"/> <b>PLEASE NOTE: If you don't write your pension plan number here, we will not be able to process your form.</b>									
Who is your employer?	<input type="text"/>									

Part 2 – About your beneficiaries

Who would you like to receive any payments? I wish to nominate the person(s) shown below/on the reverse:

Person one

Mr/Mrs/Miss/Ms/Other

Full name

Relationship to me

Address

Date of birth (DD/MM/YYYY)

D

D

M

M

Y

Y

Y

Y

National Insurance number

Percentage of any payment due

%

Person two

Mr/Mrs/Miss/Ms/Other

Full name

Relationship to me

Address

Date of birth (DD/MM/YYYY)

D

D

M

M

Y

Y

Y

Y

National Insurance number

Percentage of any payment due\*

%

\* As you want more than one person to receive a payment, please ensure the percentages total 100%. If you'd like to nominate more than two beneficiaries, please attach a copy of their details and the proportion of the benefit you'd like them to receive to this form.

If you make a nomination, we will pay at our discretion the person(s) you nominated.  
You can change your nomination at a later date simply by contacting us.

### Part 3 – Data protection – important, please read:

Use of my personal information: Legal & General takes your privacy very seriously. Legal & General use the personal information collected via this form and any other personal information that I provide to Legal & General or is provided to them on my behalf ('my information') for the purposes of (amongst other things):

- providing me with Legal & General products and services and dealing with my enquiries and requests
- underwriting and administering my personal pension plan including processing claims
- carrying out market research, statistical analysis and customer profiling. Legal & General will not sell my information to third parties for them to market to me.

Legal & General's privacy policy sets out more detailed information on how they use my information (including: their processing activities, the lawful basis for their processing, how they transfer my information and/or other information prescribed by data protection law). A copy of Legal & General's privacy policy is available at [legalandgeneral.com/privacy-policy](https://legalandgeneral.com/privacy-policy) or otherwise upon request. Any changes to Legal & General's privacy policy will be posted on this site from time to time.

### Part 4 – Your confirmation

Signature

X

Date of signature  
(DD/MM/YYYY)

D D M M Y Y Y Y

**Please sign the completed form and send it to us at:**

Legal & General  
Workplace DC Pensions  
10 Fitzalan Place  
Cardiff  
CF24 0TL

Or you can email your beneficiary instructions to us at [employerdedicatedteam@landg.com](mailto:employerdedicatedteam@landg.com)

### Contacting us

If you have any questions about completing this form, please give us a call on **0345 070 8686**.  
Call charges will vary. We may record and monitor calls.

#### **Legal & General (Portfolio Management Services) Limited**

Registered in England and Wales No.2457525

Registered office: One Coleman Street, London EC2R 5AA

We are authorised and regulated by the Financial Conduct Authority.

#### **Legal & General Assurance Society Limited**

Registered in England and Wales No.166055

Registered office: One Coleman Street, London EC2R 5AA

We are authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

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