

The Retirement Account

Expression of wish form

In respect of your Retirement Account, you may use this form to name the person (or people) you wish to be the beneficiary (or beneficiaries) of:

- The value of any remaining investments
- If you have chosen a Guaranteed Annuity, any payment in respect of the 'Money Back Guarantee' optional death benefit.
- If you have chosen a Guaranteed Annuity, any income payments in respect of an 'Income Guarantee' optional death benefit where you have not also chosen the 'Dependant's Income' optional death benefit (and the dependant is alive when you die).

How to return your form

By post

Customer Services Department
Canada Life
PO Box 4993
Worthing BN99 4AE



Please complete this form and return it to the address above.

By signing this form you are also nominating any potential beneficiary as being able to receive any remaining pension funds following your death.

Part 1: specific nomination(s)

You should note that whilst Canada Life will pay due regard to your wishes, we retain ultimate discretion as to who will receive these benefits when you die.

Policyholder details	
Quote number (if a new Retirement Account)	
Retirement Account number (if an existing Retirement Account)	
First names	
Surname	

Signature

Date (day, month, year)

Preferred beneficiary details (1)	
Name	
Address	
Relationship to you	
Date of birth	<input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/> <input style="width: 20px;" type="text"/>
	<div style="display: flex; justify-content: space-between;"> % of funds* % </div>

Preferred beneficiary details (2)

Name												
Address												
Relationship to you												
Date of birth											% of funds*	%

Preferred beneficiary details (3)

Name												
Address												
Relationship to you												
Date of birth											% of funds*	%

(* this can include charities and other organisations as well as individuals)

If you wish to name further beneficiaries, please provide their details below.

Part 2: Availability of drawdown for beneficiaries

A beneficiary chosen by Canada Life may wish to take drawdown instead of receiving a lump sum, but this is only possible if they are a “dependant” or a “nominee” (as those terms are defined in the Finance Act 2004). The way those terms are defined could stop drawdown being offered to suitable beneficiaries in some situations. If you want to ensure that the option of drawdown is available to any eligible beneficiary chosen to receive benefits on your death, tick the box below. Doing so does not mean that Canada Life will ignore your specific nominations. It just means that we will have greater scope to offer drawdown as an alternative to lump sums, particularly if your nomination form becomes out of date.

In addition to any specific nominations above, I nominate for the purposes of the relevant tax legislation any individual who is eligible to receive a lump sum on my death, so that Canada Life can offer drawdown to any such person as an alternative.

+ **Important information**

If your circumstances change and you want to alter your wishes, please request a new form.

This form supersedes any previous expression of wishes. Contact our Customer Services Team on **0800 032 7690** if you need our help.

