SCOTTISH & NEWCASTLE PENSION PLAN

UNMARRIED PARTNER DECLARATION FORM

TO BE COMPLETED BY THE MEMBER

Please return to: Scottish & Newcastle Pension Plan, Capita, PO Box 555 Stead House, Darlington, DL1 9YT

- By completing this declaration form you are stating you would like your partner to be considered for a dependants pension payable under the Trust Deed & Rules. This is subject to the submission of a valid claim in the event of your death. You don't need to make this declaration if you are married and/or in a civil partnership and co-habiting with your partner.
- This declaration alone does not give your partner an entitlement to a pension under the Scheme. In the event of your death, the Trustees of the Scheme would need to be satisfied that your relationship with your partner met the qualifying conditions for the payment of a pension at the time of your death, which are summarised under Part C. The Trustees may require further information at that time.

Part A Your Personal Details

Full Name & Title:	
Date of Birth:	
National Insurance Number:	
Home Address:	
Postcode:	
Daytime Telephone Number:	

Part B Your Partner's Details

Full Name & Title:	
Date of Birth:	
Home Address: *(this should normally be the same as the address of the member)*	
Postcode:	

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Part C Declaration

The Scheme's rules allow for the payment of a dependant's pension to a partner where, in the Trustees' opinion:

- *A dependant is someone who was financially dependent on another person, or was so dependent at the time of the other person's death.*
- *This includes anyone who shares living expenses with, or receives financial support from, the member, and whose standard of living would be affected by the loss of that person's income/ pension contribution.*

By signing this form, I confirm my belief that the eligibility criteria above are currently met in respect of our relationship.

I will tell Capita if our circumstances change and the eligibility criteria cease to be met.

I understand that the Trustees are under no legal obligation to pay any benefit to my partner unless they are reasonably satisfied that the requirements of the Trust Deed & Rules are met and that the Trustees may require additional information from my partner in order to make that decision.

Member's Signature:		Date:	

The information provided will be processed by Capita for purposes only associated with the Scottish & Newcastle Pension Plan and will be used in accordance with its policies, the Trust Deed & Rules and the General Data Protection Regulation (and any related or supplementary UK legislation).

In order to maintain the confidentiality of the information you have provided and to avoid impairing the ability of the Trustee to administer the Plan and pay the correct benefits in accordance with its statutory obligations, the Trustee does not intend sending a privacy notice (pursuant to the General Data Protection Regulation) to any named individual on this form. We assume that you have the consent of those named individuals to provide us with the information you have included on this form and you may choose to provide them with a copy of the Plan's privacy notice (a copy of which is available from Scottish & Newcastle Pension Plan, Capita, PO Box 555 Stead House, Darlington, DL1 9YT)

In the event of any differences between any of the information provided in this form and the Trust Deed & Rules, the Trust Deed & Rules will prevail.

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SUPPLEMENTARY NOTES

1. What information will my next of kin need to provide in the event of my death?

We'll require the following information from your next of kin:

- Your original death certificate
- Original marriage/civil partnership certificates (if applicable)
- Original birth certificate of spouse/civil partner/dependant (if applicable)

They will also be provided with the following for completion:

- Details of Estate form
- Beneficiaries Application form (if there is a spouse/civil partner/dependant claiming a pension)
- Bank Mandate form

We try to request all the information required to determine what benefits are payable in our initial letter. However, there may be instances where it's necessary to contact your next of kin for further details.

2. In order to assess eligibility for a dependant's pension in the event of your death, the Trustee will need to collect certain information from your dependant.

Payment of pension to a dependent partner is subject to Trustee approval and evidence of financial dependency will need to be provided. A questionnaire will be sent to your partner for completion and below is a list of some of the questions/evidence required:

- Details of income of both you and your partner
- Joint mortgage/rental agreement
- Joint utility bills
- Joint loans/credit agreements
- Bank statements showing payments made by you to your partner

It's important that all relevant information is provided with the completed questionnaire to avoid any delays and requests for further evidence.

3. How do I nominate someone to receive any lump sum in the event of my death or change the person I currently have nominated?

You can complete an Expression of Wish online at www.snpensions.com. Once you've completed the registration process/logged in, please go to the personal details section and select 'change these details'. This information will be held on your record and will supersede any forms you have previously completed.

Alternatively, you can go to Plan documents online and print an Expression of Wish form to complete and return to us.

Please note, if you're in receipt of a pension and have been for more than five years, there won't be a lump sum payable.