



# Dependant's Pension Nomination Form

**Fill in this form to tell us you'd like to nominate someone to be considered for a dependant's pension after you die.**

**Before you fill this form in:**

**Do you have defined benefit (DB) benefits?**

Members with defined contribution (DC) only benefits cannot nominate someone to receive a dependant's pension and don't need to fill this form in.

**Are you married or in a civil partnership?**

If you are married or in a civil partnership, and would like your legal spouse or civil partner to be considered for a dependant's pension after you die, you don't need to fill in this form – they will automatically be entitled to a spouse's pension.

**Do you have someone that you'd like to nominate who is dependent on you?**

If you aren't married or in a civil partnership, you can use this form to nominate someone who is dependent or financially inter-dependent on you to be considered for a dependant's pension. Read more about what this means on page 2 (under point 1 in the 'important notes' section).

**Have you been separated from your legal spouse or civil partner for more than 2 years?**

If you've been separated from your legal spouse or civil partner for more than two years and you still want your spouse or civil partner to receive a pension after you die, you don't need to fill in this form. This will happen automatically.

**Filling in this form will not guarantee that a dependant's pension will be paid to the person you nominate**

The Trustees will review your nomination after your death to decide whether they believe the person/people you nominate on this form is/are eligible.

**Contact Nestlé Pensions if you're not sure**

**If you're not sure about who you can nominate, please get in touch with Nestlé Pensions to discuss your circumstances in more detail. You can do this by on calling us on (0208) 667 6363, or by writing to/emailing us using the details on page 4.**

**Please read the notes on page 3 before you complete the form**

The Trustees of the Nestlé UK Pension Fund will only be able to pay a dependant's pension where the Fund rules allow, and the person you have nominated must be dependent or financially inter-dependent on you (in the opinion of the Trustees) on the date that you die.

**The information you give us on this form will stay confidential until after you've died.**

# Part 1 - Your details

Please complete in **BLOCK CAPITALS**

*STRICTLY PRIVATE AND CONFIDENTIAL*

<b>Title:</b> _____	<b>Personnel number:</b> _____
<b>First name:</b> _____	<b>Phone number:</b> _____
<b>Surname:</b> _____	<b>Date of birth:</b> _____
<b>Member number:</b> _____	

<b>Address:</b> _____ _____ _____
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# Part 2 - About the dependant(s) you are nominating

**You can nominate more than one dependant if you want to, but each person you nominate should be someone who is dependent or financially inter-dependent on you.**

If you aren't sure about who you can nominate, please contact Nestlé Pensions to discuss in more detail.

If you run out of space on this page, please continue on a blank sheet of paper and attach it to this form before returning to Nestlé Pensions.

<b>Full name of dependant:</b> _____
<b>Relationship to you (if any):</b> _____
<b>Date of birth:</b> _____
<b>Address:</b> _____ _____ _____

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<b>Relationship to you (if any):</b> _____
<b>Date of birth:</b> _____
<b>Address:</b> _____ _____ _____

## Important notes

### 1. The person you nominate must be dependent or financially inter-dependent on you on the date that you die

The Trustees will only be able to pay a dependant's pension to the person you have nominated if, on the date that you die they are (in the opinion of the Trustees) either:

- financially dependent on you,
- financially inter-dependent on you, or
- dependent on you because of physical or mental disability.

'Financially inter-dependent' doesn't mean that they need to rely on you completely for financial support – it means that you rely on each other for all necessary living costs and expenses so that, for example, their standard of living would be significantly affected by your death.

### 2. If you are legally married or in a civil partnership but separated

If you've been separated from your legal spouse or civil partner for at least two years you can:

- request that your legal spouse or civil partner is not paid a spouse's pension by contacting Nestlé Pensions, or
- nominate someone who is dependent or financially inter-dependent on you to be considered for a pension instead of your legal spouse or civil partner.

If you have been separated from your legal spouse or civil partner for at least two years, and you would like to nominate someone else who is dependent or financially inter-dependent on you to be considered for a dependant's pension, please fill out this form.

### 3. You can nominate more than one person for a dependant's pension

You may nominate more than one person to be considered for a dependant's pension after you die. Each person you nominate would need to be dependent or financially inter-dependent on you (in the opinion of the Trustees) on the date that you die. If the Trustees agree that they have all met the criteria, then the dependant's pension will normally be divided between them.

### 4. After you die, the Trustees will assess your nominee's dependency

The Trustees must be satisfied that the nominee(s) were:

- dependent or financially inter-dependent on the day you died, and
- that payment of a pension to your nominee is authorised under the current tax legislation.

A dependant's pension will only be paid after your death where the Fund rules allow.

### 5. Please fill in a Nomination Form to nominate a loved one for a cash lump sum

If you die while you are still working for Nestlé, or within five years of when you started to receive your pension from the Fund, a cash lump sum will also be paid by the Fund. This benefit is paid regardless of whether you are married or not or have any financial dependants. To nominate someone to be considered for this benefit please fill in a Nomination Form.

### 6. If you are a deferred member or a pensioner

Any nominations you make on this form can't be taken into account unless:

- you get divorced or dissolve your civil partnership before you die, or
- your legal spouse or civil partner dies before you.

### 7. If you get married or re-married after you've made a nomination

If you get married or re-married after you've made a nomination on this form, this nomination will no longer be valid.

### 8. If you want to withdraw your nomination

If you are married or in a civil partnership you can withdraw your nomination at any time.

If you aren't married or in a civil partnership you can withdraw your nomination up until you reach your normal pension age and while you are still an active member of the Fund (which means you will still be working for Nestlé and paying into a Fund pension). Your normal pension age is normally the same as your state pension age. If you aren't sure what it is, please contact Nestlé Pensions.

### 9. Dependent children

You can nominate a child to be considered for a dependant's pension. The Fund will provide a pension for any of your dependent children who are up to age 18, or 23 if in full-time education or training, or who (in the opinion of the Trustees) are unable to support themselves because of a mental or physical disability at the time of your death.

Please contact Nestlé Pensions for more information if you have any questions.

## Data Privacy

### Important notes about information provided in this form. Please read before completing and signing this form.

When completing this form, you will be providing personal information about yourself and others. This information is known as 'personal data' because it is personal information which allows you to be identified. Some of the information you provide may even be 'sensitive personal data' (also known as 'special categories of personal data'), either because it is information about physical or mental health or because it relates to your relationships with other people and so could relate to your sex life or sexual orientation.

The 'acknowledgement and consent' section below asks for your permission for us to use and make decisions based on any 'sensitive personal data'. The form does not ask for the consent of your nominee(s). This is because asking your nominee(s) to provide their consent may undermine the potentially confidential nature of the nomination process.

The Trustees are the 'data controller' of all personal data held for the Fund and, as such, are responsible for meeting certain legal requirements under data protection legislation in relation to that personal data. If you provide any sensitive personal data about yourself, the Trustees will need your explicit consent in order to make decisions and to use the information.

You have the right to withdraw your consent to the Trustees using the personal data given in this form at any time. However, if you do so, this will not affect the processing of any personal data which took place beforehand. If you wish to exercise your right to withdraw your consent, or if you have any queries about completing this form, please contact Nestlé Pensions.

You can read more about the Trustees' privacy policy at [nestlepensions.co.uk/privacy-policy](https://www.nestlepensions.co.uk/privacy-policy)

### Your acknowledgement and consent

I confirm that I have read and understood the 'important notes about information provided in this form' set out above before completing and signing this form.

I understand that the information I am providing includes personal data (which may include 'sensitive personal data') about me and others.

By signing this form, I consent to the Trustees using the information above for the purpose of providing any death benefits relating to me that may be paid from the Fund.

I also consent to the Trustees sharing the information contained in this form with their professional advisers (including administrators, actuaries, auditors and lawyers) if they decide that it is necessary to help with the administration of the Fund or to help pay the benefits that this form relates to.

And, I understand and acknowledge that the information that I am providing will be kept by the Trustees for as long as necessary. This is to make sure that they can:

- process any benefits relating to me that need to be paid after I die,
- deal with any queries that may arise in relation to that benefit or any decisions relating to it, and
- make sure that the Fund is properly administered

I also understand and acknowledge that the information that I am providing will be retained by the Trustee for as long as necessary to enable it to process any benefit payable in respect of me after my death, to deal with any queries that may arise in respect of that benefit or decisions relating to it, and in order to ensure the proper administration of the Fund.

**Signed:**

**Date:**

**Please return this form to: Nestlé Pensions, 1 City Place, Gatwick RH6 0PA,  
or send a scanned copy to [pensions@uk.nestle.com](mailto:pensions@uk.nestle.com)**