



**YORSSAS**

## SSAS Member Expression of Wish Form

Please complete this form to provide details of any individual(s), trust or charity you would like to receive any benefit under the scheme on your death.

Please note that the scheme trustees, including Yorssas (Trustees) Limited, are not bound by this Expression of Wish. However, it will assist the trustee in ensuring that your benefits are paid out in line with your wishes.

The trustees can pay a lump sum death benefit to any Beneficiary (as defined in the Scheme Rules) and/or a pension to any Dependant (as defined in the Scheme Rules). The trustee can also nominate an individual who is not a dependant to receive benefits on your death. However the trustees cannot nominate an individual where you have a dependant when you die, have nominated an individual who is not a dependant, or have nominated a charity.

### Member Name

|             |       |             |         |
|-------------|-------|-------------|---------|
| Member Name | Title | Forename(s) | Surname |
|-------------|-------|-------------|---------|

Scheme Name:

### Individuals

You can nominate individual(s) to receive a lump sum and/or a pension. Any individual you nominate need not be a dependant.

| Name and Address | National Insurance Number | Relationship | % Share |
|------------------|---------------------------|--------------|---------|
|                  |                           |              |         |
|                  |                           |              |         |
|                  |                           |              |         |
|                  |                           |              |         |

### Trust

If you would like any benefits payable under the scheme on your death to be paid to a Trust, please complete the details below.

Name of Trust

Name of Trustees

Date of Trust

Contact Address  
of Trust

|          |
|----------|
|          |
|          |
|          |
| Postcode |

Please note, Yorssas (Trustees) Limited cannot be held responsible for ensuring a Trust fulfills the purposes for which it was intended.

## Charity

You can nominate a charity to receive a Charity Lump Sum Death Benefit (CLSDB) however it can only be paid to a charity if you have no dependants when you die. If you die before age 75, a CLSDB can only be paid from a drawdown fund. If you die having reached age 75, a CLSDB can be paid from either a drawdown fund or uncrystallised fund.

Name of Charity

Address of Charity

|          |
|----------|
|          |
|          |
|          |
| Postcode |

Registered Charity No.  
(must be a UK  
registered charity)

## Member Declaration

Member Name

| Title | Forename(s) | Surname |
|-------|-------------|---------|
|-------|-------------|---------|

Signed

Date

Your expression of wish can be changed at any time by completing a new expression of wish form, or providing a separate written instruction.

Yorssas (Trustees) Limited suggest you take professional advice on this matter.

Please return the signed and dated form to the address shown below.



**YORSSAS**

**T** 0141 772 3365  
**E** info@yorssas.com  
**W** www.yorssipp.com

Yorssas is a trading style of Yorssas Limited (08487141) and its subsidiary Johnston Pension Trustees Limited (06023104) along with its associated company Yorssas (Trustees) Limited (06147546), all registered at c/o Calvert Dawson Limited, 288 Oxford Road, Gomersal, Cleckheaton BD19 4PY.

All calls are recorded for quality, monitoring, training, and fact verification purposes.

SSAS Member Expression of Wish Form Ref: 04/22 Page 2 of 2