



YORSIPP

SIPP 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 Yorsipp (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 trustee can pay a lump sum death benefit to any Eligible Recipient (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	Title	Forename(s)	Surname

Plan Number	
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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	Date of Birth	National Insurance Number	Relationship	% Share

Trust

Please note that Yorsipp (Trustees) Limited cannot be held responsible for ensuring a Trust fulfils the purpose for which it was intended.

Name of Trust	<input type="text"/>
Name of Trustee(s)	<input type="text"/> <input type="text"/> <input type="text"/>
Date of Trust	<input type="text"/>
Contact Address of Trust	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text" value="Postcode"/>

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	<input type="text"/>
Registered Charity No. (must be a UK registered charity)	<input type="text"/>
Address of Charity	<input type="text"/> <input type="text"/> <input type="text" value="Postcode"/>

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

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

Signature	<input type="text"/>	Date	<input type="text"/>
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Please return the signed and dated form to the address shown below.



YORSIPP

T 0141 772 3365
E info@yorsipp.com
W www.yorsipp.com

Yorsipp is a trading style of Yorsipp Limited (05743279) and its subsidiaries Astute Pension Trustees Limited (08696449) and Primetime Trustees Limited (09716098) along with its associated company Yorsipp (Trustees) Limited (04242849), all registered at c/o Calvert Dawson Limited, 288 Oxford Road, Gomersal, Cleckheaton BD19 4PY.

Yorsipp Limited is authorised and regulated by the Financial Conduct Authority (464198).
All calls are recorded for quality, monitoring, training and fact verification purposes.