

Over 50s Life Insurance

Filling out this form allows you to nominate a family member, friend, charity or other business or organisation to receive the proceeds of this plan in the event of a claim. The maximum allowable nomination is £5,000 in total. A nomination form can be completed or revised at any time and in the event of your death, Shepherds Friendly will use the most recent nomination form to determine who the lump sum should be paid to. The Nomination is not legally binding and payment of the benefit is at our discretion.

Please note: if you have opted for the Co-op Funeralcare benefit option, you should not complete this form.

Please complete in BLOCK CAPITALS and answer all questions

Company name:

Adviser name:

Advised sale: Yes No

Please choose delivery option:

Original policy to client copy to adviser Original policy plus copy to adviser

A Your personal details

1 Mr/Mrs/Ms/Miss/Other

2 Forename(s)

3 Surname

4 Address

Postcode

5 Telephone No. (Home)

Telephone No. (Mobile)

Email

6 Date of birth / /

7 Plan number

B Nominee details

Under the Friendly Societies Act 1992 you may nominate up to £5,000 or the value of your lump sum at the time of your death to a named nominee.

You can choose to nominate more than one person to receive the proceeds of your Over 50s Life Insurance. If you wish to nominate more than two people, please contact our Member Services team on 0800 526 249.

Please advise us of your nomination details:

| | |
|---------------------------------|-------------------------------|
| Nominee 1 | 1 Mr/Mrs/Ms/Miss/Other |
| 2 Forename(s) | 3 Surname |
| 4 Address | |
| Postcode | |
| 5 Telephone No. (Home) | |
| Telephone No. (Mobile) | |
| Email | |
| 6 Relationship to member | 7 Percentage % |

| | |
|---------------------------------|-------------------------------|
| Nominee 2 | 1 Mr/Mrs/Ms/Miss/Other |
| 2 Forename(s) | 3 Surname |
| 4 Address | |
| Postcode | |
| 5 Telephone No. (Home) | |
| Telephone No. (Mobile) | |
| Email | |
| 6 Relationship to member | 7 Percentage % |

Total percentage 100%

I, **(full name)** _____
being a member of the Shepherds Friendly Society hereby nominate individuals mentioned in section B as the person to whom any sum of money payable by the Society on my death, not exceeding the limit for the time being specified by law, shall be paid.

Signed by (member): _____ **Date:** _____

Witnessed by: _____ **Date:** _____

C Declaration and consent

Changes in circumstances:

Should you need to update or cancel your nomination, please let us know as soon as possible.

Please note that this nomination will be cancelled if:

- You replace it with a new nomination by filling in another form at a later date
- You marry (even if you marry your nominee), as this may change who the benefit should be paid out to legally
- Your nominee dies

This form will supersede any previous nomination you have made. You can only nominate up to the value of £5,000 of the lump sum.

Our privacy promise

Your privacy is of the highest importance to us, and unless you give us permission to do so, we will never release personal information to anyone outside the company for their mailing or marketing purposes.

You can view our full privacy notice by visiting our website - www.shepherdsfriendly.co.uk/privacy-policy



The Shepherds Friendly Society Limited Registered Office:

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Shepherds Friendly is a trading name of the Shepherds Friendly Society Limited which is an incorporated Friendly Society under the Friendly Societies Act. Registered No 240F. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority, Financial Services Register No 109997. The Head office and Registered office of The Shepherds Friendly Society is based in the United Kingdom.