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Description automatically generated**

**Death Grant Nomination Form for Local Government Pension Scheme Members**

The scheme rules allow you to nominate the person or people you want to receive your death grant if one is payable. Please read the enclosed notes before completing this form.

**Your full name**

**Title**

**Date of birth**

**National Insurance number**

**Home address and postcode**

In the event of my death, I wish North Yorkshire Pension Fund (NYPF) to consider paying any lump sum death grant to:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Name** | **Address** | **Age**  **(if under 18)** | **Relationship**  **(if any)** | **Allocation %**  **(\*see note)** |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |
| 4 |  |  |  |  |  |
| 5 |  |  |  |  |  |
| 6 |  |  |  |  |  |
| \* The individual allocation must be completed and add up to 100% | | | | | **100%** |

If you wish to nominate more than six beneficiaries, please continue on a blank piece of paper and securely attach it to this form.

To avoid inheritance tax on your death, the NYPF must retain absolute discretion about who the death grant is paid to and will use your nomination as a guide to your wishes. You can update your nomination at any time, please see the ‘notes’ on the next page for details of how to do this.

**Please ensure that you sign and date your form before you return it. It is not valid without a signature and date on it.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Signed:** |  | **Date:** |  |

**Data Protection:** The General Data Protection Regulation requires us to keep information about you securely. It also requires us to keep accurate information and keep it up to date. You can help us to do this by telling us when the details we hold about you change. We also have a duty to protect public funds; in order to do so we share information with other public organisations to prevent and detect fraud.

If you would like this information in another language or format please telephone 01609 780780 or email: [customer.services@northyorks.gov.uk](mailto:customer.services@northyorks.gov.uk)

**Return this form to North Yorkshire Pension Fund, County Hall, Northallerton, DL7 8AL**

**Nomination Form Notes**

The North Yorkshire Pension Fund has absolute discretion over who to pay your death grant to and will use your nomination as a guide to your wishes. This enables the payment to be made free from Inheritance tax. It is therefore important that you review and update your nomination regularly.

**How can I check that you have received my nomination form?**

Log onto your online pension record at www.nypf.org.uk and select ‘Options’ and then ‘Beneficiary Nomination’. You can view your nominees and the percentage of the lump sum that you have allocated to each.

**Who can the death grant be paid to?**

Anyone you wish, including registered charities. You do not have to pay the whole death grant to one nominee but you must tell us how much you want each one to receive e.g. 40%, 60% etc. and the total must add up to 100%.

**Inheritance Tax**

By completing a nomination form your lump sum death grant is usually excluded from any calculation of Inheritance Tax.

**Can I change my nomination?**

Your nomination can be changed at any time by logging onto your [online pension record](https://mypension.northyorks.gov.uk/) at [www.nypf.org.uk](http://www.nypf.org.uk) or by completing a new form. You can download a form at www.nypf.org.uk > Forms/Guides > Useful Forms.

**What if the person I nominate dies before me?**

If you have listed more than one nominee and any one of them dies you will need to complete a new form. If you have nominated a spouse and you subsequently divorce, the nomination will no longer stand. You will need to nominate a new beneficiary.

It is recommended that you review your nominations every time your personal circumstances change like getting married, entering into a civil partnership, having children or getting divorced.

**What if I don’t complete a nomination?**

A death grant will be due to your estate and will be paid to whoever is legally entitled to receive it. Who that person is will depend on whether you have made a Will or not. Depending on the value of your estate, it may be necessary for your personal representatives to apply for a Grant of Probate (or Letters of Administration if you have not made a Will). If you haven’t written a Will your estate might not be distributed in the way you would wish.

The death grant may also be subject to Inheritance Tax depending on the value of your estate.

**Can I nominate a child under age 18?**

Yes, but you should also include your wishes in a Will and make the necessary arrangements to make the payments to a minor.

**What should I do now?**

If you wish to nominate somebody, please complete a death grant nomination form and return it to:

North Yorkshire Pension Fund, County Hall, Northallerton, North Yorkshire, DL7 8AL.

**Please make sure you sign and date the form before you return it.**