

Expression of wish form

For use with either the Retirement Advantage Guaranteed Annuity, or the Retirement Advantage Flexible Income Annuity with commencement dates after 2nd December 2013

You may use this form to name the person (or people) you wish to be the beneficiary (or beneficiaries) of:

- any continuing payments under a guaranteed period, or
- a value protection lump sum

in respect of your annuity contract with Retirement Advantage.

You can name anybody you want. However you should note that whilst Retirement Advantage will pay due regard to your wishes, we retain ultimate discretion as to who will receive these benefits when you die.

Please complete this form and return it to the following address:

Customer Services Department
Retirement Advantage
PO Box 4993
Worthing
BN99 4AE

Policyholder details

Quote number (if a new annuity):

Policy number (if an existing annuity):

First names:

Surname:

Signature:

Date

D	D	M	M	Y	Y	Y	Y
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Preferred beneficiary details (1)

First names:

Surname:

Address & postcode:

Relationship to you:

Date of birth

D	D	M	M	Y	Y	Y	Y
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Proportion due to the beneficiary shown above:

%

You do not need to allocate all of the benefit available, but the total that you do nominate must not exceed 100%.

Preferred beneficiary details (2)

First names:									
Surname:									
Address & postcode:									
Relationship to you:	Date of birth <table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		
Proportion due to the beneficiary shown above: %									
Total number of beneficiaries:									

Preferred beneficiary details (3)

First names:									
Surname:									
Address & postcode:									
Relationship to you:	Date of birth <table border="1"><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>	D	D	M	M	Y	Y	Y	Y
D	D	M	M	Y	Y	Y	Y		
Proportion due to the beneficiary shown above: %									
Total number of beneficiaries:									

If you wish to name further beneficiaries, please provide their details on a separate sheet.

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Important

Please ensure you have signed and dated the form on page 1.

If your circumstances change and you want to alter your wishes, please request a new form. This should be completed and returned to your financial adviser, or direct to Retirement Advantage.

This form supersedes any previous expression of wishes.

Contact our Customer Services Team on 0800 032 7690 if you need our help.