

MetLife Retirement Portfolio Beneficiary Nomination Form

Beacon House,
27 Clarendon Road,
Belfast BT1 3BG

0800 022 4443
www.metlife.co.uk

For the payment of death benefits

Before you start

This form can be used to provide a new nomination in respect of any death benefits payable from your Retirement Portfolio, or to replace an existing nomination.

1 About you

Title

Mr Mrs Miss Ms Other - *please specify*

First name(s)

Surname

Date of birth

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

National Insurance Number

--	--	--	--	--	--	--	--	--	--

MetLife policy number

L														
---	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Marital status

Single Married Civil Partnered Widowed Divorced Dissolved Civil Partnership

Permanent residential address

City	Country	Postcode							
------	---------	----------	--	--	--	--	--	--	--

Would you nominate:

one or more individuals - go to section 2 a Trust - go to section 3 a charity - go to section 4

2 Your nominated beneficiary / beneficiaries

First beneficiary

Title

Mr Mrs Miss Ms Other - *please specify*

First name(s)

Surname

Permanent residential address

City

Country

Postcode

Date of birth

Nationality

Relationship to you - Son, granddaughter etc.

Percentage share*

 %

Second beneficiary

Title

Mr Mrs Miss Ms Other - *please specify*

First name(s)

Surname

Permanent residential address

City

Country

Postcode

Date of birth

Nationality

Relationship to you - Son, granddaughter etc.

Percentage share*

 %

Third beneficiary

Title

Mr Mrs Miss Ms Other - *please specify*

First name(s)

Surname

Permanent residential address

City

Country

Postcode

Date of birth

Nationality

Relationship to you - Son, granddaughter etc.

Percentage share*

 %

Fourth beneficiary

Title

Mr Mrs Miss Ms Other - *please specify*

First name(s)

Surname

Permanent residential address

City

Country

Postcode

Date of birth

Nationality

Relationship to you - Son, granddaughter etc.

Percentage share*

 %

***Total % shares for all beneficiaries must equal 100%**

3 Nominating a Trust

Name of Trust

Date Trust established

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

First Trustee

Title

 Mr Mrs Miss Ms Other - *please specify*

First name(s)

Surname

Permanent residential address

City	Country	Postcode	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
------	---------	----------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------

Second Trustee

Title

 Mr Mrs Miss Ms Other - *please specify*

First name(s)

Surname

Permanent residential address

City	Country	Postcode	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
------	---------	----------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------

Third Trustee

Title

 Mr Mrs Miss Ms Other - *please specify*

First name(s)

Surname

Permanent residential address

City	Country	Postcode	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
------	---------	----------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------

Fourth Trustee

Title

 Mr Mrs Miss Ms Other - *please specify*

First name(s)

Surname

Permanent residential address

City	Country	Postcode	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
------	---------	----------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------

4 Nominating a charity/charities

Where you have no dependants you may like to nominate one or more charities to receive a lump sum death benefit on your death.

First charity

Name of charity

Percentage share

 %

Permanent residential address

City

Country

Postcode

Second charity

Name of charity

Percentage share

 %

Permanent residential address

City

Country

Postcode

5 Your declaration

Changing your nomination

The Scheme Trustee will refer to your latest nomination when they are notified of your death. We recommend you review your nomination from time to time – especially if your circumstances change. You can let us know about any changes to your chosen beneficiaries by writing to us or filling in a new Nomination form.

Declaration

If I still have assets in my MetLife Retirement Portfolio when the Scheme Administrator is notified of my death, I understand they will, acting on the instructions of the Scheme Trustee and subject to any relevant taxes, pay a lump sum and/or income benefits.

I understand the Trustee's discretion is absolute, but I wish the Trustee to consider making payment in line with my wishes as indicated in this form.

Data Protection

MetLife is the data controller in respect of any personal data you provide to us. The ways in which MetLife may collect, share or process your personal data are explained in MetLife's Privacy Notice. MetLife's Privacy Notice also explains your rights regarding your personal data. A copy of MetLife's Privacy Notice is available on our website, www.metlife.co.uk.

Should you have any questions or concerns, please contact the MetLife Data Protection Officer at DataProtectionUK@MetLife.com.

Member signature

Date

MetLife Customer Service Centre

Beacon House, 27 Clarendon Road, Belfast BT1 3BG

Tel: 0800 022 4443

Fax: 0289 023 2965

Email: customerservice@metlife.co.uk

Products and services are offered by MetLife UK Limited which is an affiliate of MetLife, Inc. and operates under the "MetLife" brand.

MetLife UK Limited is a private company limited by shares, registered in England and Wales under company number 13992711. Registered office at Invicta House, Trafalgar Place, Brighton BN1 4FR, England. MetLife UK Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority.

COMP 0223.12 MAR2024