

# 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.

Title  Mr Mrs Miss Ms	Other - please sp	acity
	Jourier - piease sp	ecny
First name(s)		Surname
Date of birth		National Insurance Number
D D M M Y Y Y		
MetLife policy number		
L		
Marital status		
	ed Widowed	☐ Divorced ☐ Dissolved Civil Partnership
Permanent residential address		
City	Country	Postcode Postcode

# 2 Your nominated beneficiary / beneficiaries

First beneficiary		
Title		
☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other - please spe	ecify	
First name(s)	Surname	
Permanent residential address		
City Country	Postcode	
Data of leistle Mationalia.		
Date of birth Nationality		
Relationship to you - Son, granddaughter etc.		Percentage share*
		%
Second beneficiary		
Title  Mrs Miss Ms Other - please specific	a cifu	
First name(s)	Surname	
Permanent residential address		
Permanent residential address		
City Country	Postcode	
Date of birth Nationality		
D D M M Y Y Y		
Relationship to you - Son, granddaughter etc.		Percentage share*
		70
Third beneficiary		
Title		
☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other - please spe	ecify	
First name(s)	Surname	
Permanent residential address		
City Country	Postcode	
Date of birth Nationality		
D D M M Y Y Y Y		
Deletionalis to very Company and a contract		
Relationship to you - Son, granddaughter etc.		Percentage share*

Your nominated beneficiary / beneficiaries continued...

Fourth beneficiary				
Title				
☐ Mr ☐ Mrs ☐ Miss ☐ I	Ms $\Box$ Other - please spe	ecify		
First name(s)		Surname		
Permanent residential address				
City	Country		Postcode	
Date of birth	Nationality			
D D M M Y Y Y				
Relationship to you - Son, grandda	ughter etc.			Percentage share*
				%

<sup>\*</sup>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		
First Trustee Title			
	please specify		
First name(s)	Surname		
This name(s)			
Permanent residential address			
City Count	try Postcode Dominion		
Second Trustee			
Title			
☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other - p	please specify		
First name(s)	Surname		
Permanent residential address			
City Count	try Postcode Postcode		
Third Trustee			
Title			
☐ Mr ☐ Mrs ☐ Miss ☐ Ms ☐ Other - p	please specify		
First name(s)	Surname		
Permanent residential address			
City Count	try Postcode Postcode		
Fourth Trustee Title			
	please specify		
First name(s)	Surname		
	Same		
Permanent residential address			
remailent residential address			
City	try Postcode Postcode		
City Count	u y		

## 4 Nominating a charity/charities

Final abanis.

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			
C'.		Do stoods	
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

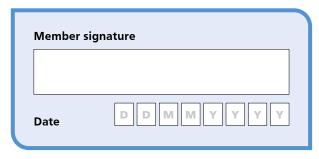
If I still have assets in my MetLife Retirement Portfolio when the Scheme Administrator is notified of my death, I understand they will, acting on the instructions of the Scheme Trustee and subject to any relevant taxes, pay a lump sum and/or income benefits.

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.



#### 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.

