

BENEFICIARY NOMINATION FORM

1 Introduction

This form should be completed in English and in CAPITALS and sent to Zurich International Life or your plan trustees if in trust. Please ensure this form is signed on page four to validate the request. Please use a separate piece of paper if more space is needed.

Company name

Plan name

Plan number

Plan member's name

Payroll reference number

Address for correspondence



Beneficiary(ies) (continued)

Beneficiary 3

Title Mr Mrs Miss Ms Dr Other please give details

Family name

Forename(s)

Relationship

Gender

Male

Female

Occupation

Residential address

Date of birth

Day

Month

Year

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Share

%

Beneficiary 4

Title Mr Mrs Miss Ms Dr Other please give details

Family name

Forename(s)

Relationship

Gender

Male

Female

Occupation

Residential address

Date of birth

Day

Month

Year

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

Share

%

3 Declaration

I confirm that:

- i) this supersedes all previous beneficiary nominations; and
- ii) I may revoke this request at any time by submitting a new beneficiary nomination form to the trustee/employer; and
- iii) I understand that this beneficiary nomination will be revoked automatically in the event of any of the persons who are to benefit predeceasing me; and
- iv) none of the persons nominated as beneficiary/ies is/are resident in the Island of Jersey (if in trust with Zurich Trust Limited).

Data protection

I understand that the information that I supply, including health details, will be held and used for the purposes of processing and administering the contract/policies by any of the Zurich Financial Services Group (Group companies), by re-insurers, by reference agencies, by third parties who provide relevant services to you and by my relevant financial professional. I understand that the information that I supply may also be used in the prevention of fraud and financial crime, and may be required to be passed to other companies, public bodies including the police, or to an insurers' database. I understand that the information that I supply may also be passed to governmental, regulatory or other bodies as required by law.

The information may also be used by your Group companies and relevant third party service providers for accounting, statistical or research purposes and may be transmitted by any usual means including the internet. I understand that you will only communicate with me using the contact details that I supply to you. Where I have provided more than one form of contact details, you will use the most appropriate method of communication depending on the urgency and sensitivity of the information.

I note that you may record or monitor my telephone calls in order to offer additional security, resolve complaints and for training, administrative and quality purposes.

I confirm that I agree to the information being collected and used as set out above. I understand that individuals are entitled to receive a copy of their personal data held by you and to correct any errors.

Signature

Date

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

4 Notes when plan is held in trust with Zurich Trust Limited

1. In the event of the plan member dying before the trust fund has been used in providing benefits under the plan, the rules provide for the trust fund to be realised and the net proceeds to be paid to or for the benefit of such one or more of the named class (see below) as the plan member requests the trustee in writing before the death.
2. The plan member's estate cannot be nominated.
3. Payment may be made to a trust for the benefit of one or more of the named class.
4. Any nomination or revocation thereof must be in writing and will be valid only if received by the trustee (or its agents) before the member dies.
5. If the plan member does not leave any beneficiary nominations, the death benefit would be payable to (or may be applied for the benefit of) such one or more of the named class as the trustee decides, after consultation with the principal employer.
6. The full provisions are contained in the rules, which alone govern the plan.
7. The 'named class' comprises:
 - a) any spouse of the plan member;
 - b) any person who although not married to the plan member and regardless of whether that person or the plan member is married, was, or is shown to the satisfaction of the trustee, after consultation with the principal employer to be or to have been, living with the plan member as the plan member's spouse at or before the date of the plan member's death;
 - c) any child, brother or sister of the plan member or their spouse;
 - d) any parent, ancestor, descendant or collateral relative to the plan member or their spouse;
 - e) any person who is or was regarded by the plan member, or who is shown to the satisfaction of the trustee, after consultation with the principal employer, to be or to have been wholly or partly financially dependent on the plan member;
 - f) any person who is the spouse or issue of any person referred to above, but excluding any person resident in the Island of Jersey.For the purposes of this definition:
 - i) 'spouse' includes wife, husband, civil partner, widow or widower and any former wife or husband;
 - ii) 'descendant' includes any person claiming by reason of adoption;
 - iii) 'ancestor, descendant or collateral relative' includes ancestors, descendants or collateral relatives of both the whole-blood and the half-blood;
 - iv) 'child' includes any step child, step grandchild, adopted child, legitimated or illegitimate child.

Zurich International Life Limited (Singapore branch) is authorised by the Monetary Authority of Singapore to conduct life insurance business in Singapore. Member of the Life Insurance Association of Singapore. Member of the Singapore Financial Dispute Resolution Scheme.

Zurich International Life Limited is registered in Bahrain under Commercial Registration No. 17444.

Zurich International Life Limited is authorised by the Qatar Financial Centre Regulatory Authority.

Zurich International Life Limited are registered (Registration No. 63) under UAE Federal Law Number 6 of 2007, and its activities in the UAE are governed by such law.

Zurich International Life is a business name of Zurich International Life Limited which provides life assurance, investment and protection products and is authorised by the Isle of Man Government Insurance and Pensions Authority.

Registered in the Isle of Man number 20126C.

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Registered in Singapore No. F06754G.

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Calls may be recorded or monitored in order to offer additional security, resolve complaints and for training and quality purposes.

