



USS Expression of Wish form

Use this form to nominate who will receive any lump sum payment in the event of your death. It is recommended that you update this form at least every three years.

Please complete this form using BLOCK CAPITALS.

Please return this form to: Universities Superannuation Scheme, Royal Liver Building, Liverpool, L3 1PY.

Member Details

Title _____ Surname _____

First names _____

National Insurance Number _____ Date of birth _____

Employer _____

Beneficiary or beneficiaries

Name _____ Relationship to member _____ Proportion (%) _____

Address _____

Name _____ Relationship to member _____ Proportion (%) _____

Address _____

Name _____ Relationship to member _____ Proportion (%) _____

Address _____

If you would like to nominate more than three beneficiaries, please complete additional copies of this page of the form.

Alternative wishes

If any of the above predecease me, I wish the trustee company to consider the following:

Data protection

Universities Superannuation Scheme Limited takes its obligations under the General Data Protection Regulation (GDPR) and has appropriate procedures in place to ensure that your personal data and rights are protected.

The information provided on this form will be used for the purpose administering your pension. Where necessary, we may disclose this information to our appointed third parties, for example, legal advisers. Please ensure any other persons named on this form are made aware that their information will be submitted to us for these purposes.

Find out more about how we collect and process your personal data, protect your privacy, and how you can contact our data protection officer by visiting uss.co.uk/privacy-notice.

Declaration by member

I wish the persons named overleaf to be considered as possible recipients of any lump sum from USS payable on my death at the discretion of the trustee company (Universities Superannuation Scheme Limited) under the scheme's discretionary trusts (see below) and (where more than one person is named by me overleaf) in the proportions indicated. The person(s) named overleaf will also be considered as possible recipients of any fund value payable in respect of Money Purchase Additional Voluntary Contributions (MPAVC) paid under the Scheme's Rules, unless I have made a specific direction in writing in respect of my MPAVC, in which case I understand that the MPAVC fund payable is likely to be subject to inheritance tax.

I confirm that I understand that, under USS rules, the trustee company can take this Expression of Wish into account when deciding how to exercise its discretionary powers but is not legally bound to do so. This supersedes any previous Expression of Wish signed by me.

Member's signature _____ Date _____

Witnessed by

Name (the witness must not be one of the beneficiaries) _____

Address _____

Witness signature _____ Date _____

Definitions

DISCRETIONARY TRUSTS means, in relation to any sum directed to be held on such trusts in respect of a deceased individual, the trusts, powers and provisions set out below:

- (a) the trustee company may pay or apply the whole or any part of that sum to or for the benefit of all or any of the relatives, dependants, personal representatives or nominated beneficiaries of the deceased individual in such shares and proportions as the trustee company may decide;
- (b) if the deceased leaves no relative or dependant, the trustee company may elect to retain all or any part of the sum in the fund;
- (c) the trustee company may declare in respect of the sum or any part of it such separate trusts, terms and limitations (including for maintenance, education, advancement and accumulation of income during a minority) as the trustee company may by deed appoint without infringing the rule against perpetuities; the trustee company may appoint as trustees of such trusts any two or more persons or a trust corporation and may provide for the remuneration of any such trustee;
- (d) to the extent that the trustee company does not exercise the powers under paragraphs (a) and (c) within two years of the death of the individual, the trustee company shall hold that sum outside the fund upon trust for the personal representatives of that individual or, if there are none, the statutory next of kin of that individual; and
- (e) the trustee company may have regard to any document signed by the individual expressing wishes as to the disposal to or for the benefit of nominated beneficiaries of any sum to be held upon the discretionary trusts.

DEPENDANT means, in relation to a person, an individual (whether or not a relative) who in the opinion of the trustee company is at the time of the death of that person wholly or partly either:

- (a) financially dependent on that person; or
- (b) dependent on that person because of any physical or mental disability.

RELATIVE means, in respect of a deceased member, former member or ex-spouse, any living individual who is:

- (a) the surviving spouse or civil partner;
- (b) a lawful, natural or adoptive parent or the surviving spouse or civil partner of such parent;
- (c) a lawful, natural or adoptive child, or remoter issue, of such parent, or the spouse or civil partner, or surviving spouse or civil partner, of any such person; or
- (d) a former spouse or civil partner

NOTE If you do not leave a spouse or civil partner but do have a dependant, you may wish to indicate to the trustee company your wishes relating to any pension which may become payable after your death. If so, you should complete a Registration of potential dependant form available from the USS website uss.co.uk. For a glossary of our terms please see more information on our [important information](#) page.