

Expression of Wish

Your Rothesay policy may pay a lump sum when you die. Please use the form on the next page to let us know who you would like to receive any lump sum payable, if applicable.

Please read the notes below before completing the form.

Important notes

Is a lump sum normally payable when a policyholder dies?

No, in many cases there is no lump sum paid when a policyholder dies. Please refer to your policy document for further information.

Does Rothesay always pay who I nominate?

No, but we do always consider your nominations before making our decision.

We have discretion to pay any lump sum payable on your death to one or more of your 'eligible beneficiaries'. 'Eligible beneficiaries' will be defined in your policy but include any person(s) or body (including an unincorporated association and the trustees of any trust) named in the latest Expression of Wish form that we receive from you before your death.

What happens if I do not complete an Expression of Wish form?

The fact that you have not completed an Expression of Wish form will not prevent us from making any payment due, but we will have no way of taking your wishes into account when deciding who will receive the payment.

Is there a limit on the number of people I can nominate?

No. If you would like to nominate more than one person, please specify the percentage that you would like them to receive. If you would like to nominate more than three people, please write their details on a separate sheet of paper with your name and policy number at the top and send it back to us with the declaration.

If you would like your benefits to be paid to your estate upon your death, please write 'To My Estate' in the 'Full name and title' box.

Can I change my mind?

Yes. You can change your nominations as many times as you would like, but we will only look at the most recent form when making our decision.

Is there a deadline for submitting this form?

No. You can send it to us at any time, but it is best to complete it as soon as possible.

Is this form confidential?

Yes. We treat all information on this form as confidential. You can read the latest version of our full privacy notice here: www.rothesay.com/data-protection/privacy-notice-for-policyholders

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Name:	
Policy number:	

Your nominations

Beneficiary 1	
Full name and title:	
Date of birth:	
Address:	
	Postcode: <input type="text"/>
Percentage of benefit:	<input type="text"/> %

Beneficiary 2	
Full name and title:	
Date of birth:	
Address:	
	Postcode: <input type="text"/>
Percentage of benefit:	<input type="text"/> %

Beneficiary 3	
Full name and title:	
Date of birth:	
Address:	
	Postcode: <input type="text"/>
Percentage of benefit:	<input type="text"/> %

Your declaration

I have read the notes on the previous page before completing this Expression of Wish form and I would like to nominate the person(s) listed above to receive any lump sum death benefit, if applicable, when I die. I understand that this form is non-binding and Rothesay will make the final decision, but I would like my nomination(s) considered. If this is not the first Rothesay Expression of Wish form I have completed, I understand it will override any previous ones.

Signature: _____ Date: _____