

**BAE Systems Pension Scheme – 2000 Plan Benefits
(‘the Scheme’)
Nomination of Specified Dependant form**

This form is for completion by a Member who wishes to nominate a Specified Dependant.

Before completing this form, please ensure you have read the accompanying notes and have attached the necessary documentary evidence.

If you are nominating more than one Specified Dependant, you must complete a separate form for each person you are nominating and record the names of the other Specified Dependents overleaf.

Member details

Surname		Forename(s)	
NI number		Date of Birth	
Email			
Address & contact telephone number			

Please tick

Membership category Active Deferred

All nominations must be received before age 65 or, if earlier, before pension starts. No nominations can be made by pensioners.

Marital Status Single Married Civil Partner Divorced

In this section please provide details of the person you are nominating and their relationship to you.

Specified Dependant details

Surname		Forename(s)	
NI number		Date of Birth	
Email			
Address & contact telephone number			
Relationship			

Only complete this section if you have a Legal Spouse or Civil Partner. Please tick the appropriate boxes:

I have a Spouse/Civil Partner

Provide name of Spouse/Civil Partner

I am not ordinarily resident with my Spouse/Civil Partner

Note: If you are resident with your Spouse or Civil Partner you cannot nominate a Specified Dependant.

Dependency

In this section please provide details of the Specified Dependant's financial dependency.

For the nomination to be accepted, the Trustee must be satisfied that the Specified Dependant is wholly or mainly dependent upon you (the Member) for the ordinary necessities of life. This must be the case at the time of nomination. Please note that the same level of dependency will also be tested when the benefit becomes payable.

Is the nominee wholly or mainly dependent upon you? Yes

No

You must be prepared to provide documentary evidence of the Specified Dependant's dependency to the Trustee.

Please provide copies of the relevant documents and provide any written evidence on a separate sheet of paper.

Please tick the appropriate boxes to indicate what documents you have provided. Have you included;

Details of the income of the Specified Dependant (include details of any allowance you pay the Specified Dependant, and any pensions or salary they receive)?

Details of living expenses, shared with the Specified Dependant?

Details of any other income the Specified Dependant has (interest from investments, State Benefits, etc.)?

Copies of bank statements, mortgage statements and utility bills?

A written statement, if this will be helpful to the Trustee?

The Specified Dependant's Birth Certificate?

More than one Specified Dependant?

Complete this section if you are nominating more than one person for consideration as a Specified Dependant. Separate forms must be completed for each person being nominated.

Please tick this box if you are nominating more than one Specified Dependant

Please provide names of other persons being nominated as Specified Dependents.

Declaration by Member

I declare the statements on this form are true to the best of my knowledge and belief and I have read and understood the accompanying notes.

I understand that a Specified Dependant’s pension will only be paid if this nomination is accepted by the Trustee and if my Specified Dependant is still wholly or mainly dependent upon me when I die.

I understand that, if I have declared that my Spouse or Civil Partner is no longer resident with me, no pension benefits will be payable to the Spouse or Civil Partner, even if my Specified Dependant predeceases me.

Name: _____ Signature: _____ Date: _____

Once completed this form and relevant accompanying documents should be returned to:
Pensions Service Centre, PO Box 1194, Crawley, West Sussex, RH10 0FZ

Trustee Decision

The above named Specified Dependant is

Accepted

Not accepted

Name: _____ Signature: _____ Date: _____

The Trustee will collect and process information about you that may be subject to data protection laws. For more information about how it uses and discloses your personal information, how it protects your information, its legal basis to use your information, your rights and who you can contact, please refer to the relevant sections of the Privacy Notice at: baesystems.com/en/privacy