

Nomination form

For an adult dependant's pension



Please read the important notes section before sending this form to us.

You must complete **ALL THREE sections** of the form, and return it to:

BT Pension Scheme, Sunderland, SR43 4AD

Section 1: Your personal details

Please provide your personal details so the Trustee can store this information with your member record.

(Please complete in BLOCK CAPITALS)

Full name:	
National Insurance number:	
Unique Pension Reference Number:	«Member_Reference»
Date of birth:	

Section 2: Your nomination

You may only nominate one adult dependant.

I hereby nominate: (Please complete in BLOCK CAPITALS)

Name and Address	Relationship to you	Date of Birth

Section 3: Your signature and declaration

I declare that the information I have provided in this form is true and correct.

I understand that where the application is made for an adult dependant's pension it will be acknowledged in writing and retained. I further understand that the eligibility of my nominated dependant for an adult dependant's pension will only be considered upon my death, in accordance with the requirements of the Rules of the BT Pension Scheme and applicable legislation and that, even if the financial conditions are met, the payment of an adult dependant's pension is at the absolute discretion of the Trustee.

This Nomination form supersedes any previous nominations made by me and I reserve the right to revise this nomination at any time by submitting a new form to the Trustee.

The General Data Protection Regulation (EU) 2016/679

- BT Pension Scheme, the Administrator of the BT Pension Scheme, will process the personal data you provide in this form on behalf of the Trustee of the BT Pension Scheme, who will be the data controller of your personal information under The General Data Protection Regulation (EU) 2016/679.

- BT Pension Scheme, on behalf of the Trustee, will process your personal data for the purposes set out in this form and it will share your personal data with third parties including, the professional secretariat to the Trustee to administer the BT Pension Scheme. This will not involve any transfer of your personal data outside of the European Economic Area.

By signing below, I understand that:

- I understand that I am providing the Trustee with personal data, and possibly sensitive personal data, within the definition of The General Data Protection Regulation (EU) 2016/679.
- By signing this form, I also consent explicitly to the Trustee (and any other data processors and controllers it uses) processing any personal data and any sensitive personal data about me for any purposes associated with my pension.
- This information may be transferred to third parties who advise or assist the Trustee. Where I disclose to the Trustee personal data relating to the adult dependant nominated, as agent on behalf of that individual, I give consent on their behalf and have informed them of the identity of the Trustee as the data controller in relation to their data and the purpose (as set out above) for which their personal data will be processed.

Signature:

Date:

Important Notes

On the death of a member of the BT Pension Scheme (the Scheme), a Pension is generally payable to a surviving spouse or civil partner.

This form allows you to nominate someone to be considered for an adult dependant's pension in the event of your death, if you do not have a spouse or civil partner. This person must be wholly or partly financially dependent on you (referred to as an adult dependant).

In the event of your death, the Trustee will consider your nomination for any adult dependant's pension. However, it will only be paid if, at the time of nomination and time of death, the adult dependant satisfies the Trustee that he or she was wholly or partly financial dependent on you (and meets any other relevant the conditions laid down in the Rules of the Scheme (the Rules) and other relevant legislation). Further information will be requested from your nominated adult dependant after your death.

This form should only be completed by you as a member of the Scheme. This form will be treated in the strictest confidence and will normally be looked at by the Trustee in the event of your death.

When should I make a nomination?

If you were leaving no surviving spouse/civil partner, but financially support another adult, it may be appropriate for you to nominate that person to be considered by the Trustee to receive the adult dependant's pension.

The payment of any adult dependant's pension is at the absolute discretion of the Trustee. Your nomination does not guarantee the payment of a pension. However, your nomination is a useful guide to the Trustee and ensures the person you nominate is considered for a pension.

It is possible, where certain conditions are met, for the trustee to pay a pension to someone who they judge to be wholly or partly financially dependent on you at the date of your death without having received a nomination.

Who can be nominated as an adult dependant?

The Scheme rules define a dependant for this purpose as an adult person who is, in the opinion of the Trustee, wholly or partly financially dependent on the member, both at the date of nomination and immediately before the member's death. Subject to such financial dependence, the range of persons to whom an adult dependant's pension could be paid might include:

* A relative, including a child of 18 or over who would be incapable of self-support by reason of bodily or mental infirmity and who might otherwise receive, at the Trustees discretion, an incapacitated child's pension.

* A common-law wife or husband.

* Any individual with whom the member has an established inter-dependent relationship. (This may include a relationship with a member of the same sex).

The Trustee will not normally authorise payment of an adult dependant's pension to a mentally capable and able-bodied young person who happens to be still living at home with parents.

If you are considering making a nomination you should bear in mind that children's pensions are payable at a higher rate if there is no spouse/civil partner's or adult dependant's pension payable.

What does 'financially dependent' mean?

A person may be considered wholly or partly financially dependent on you if, for example:

- They share living expenses with you;
- They receive financial support from you;
- Their standard of living would be affected by the loss of your contribution or support.

For example, someone whose position may be temporarily improved by periodic gifts from you may not qualify.

Assessing financial dependency needs to be done carefully by the Trustee and after reviewing suitable evidence. This is both to comply with the Rules and to ensure that the payment is of a type permitted by HM Revenue and Customs.

Please note: Section C Rules state that the Trustee has the discretion to decide whether the dependant's pension should be reduced if the adult dependant is more than 10 years younger than the member. This does not apply within the Section A and B Rules.

How much would the pension be?

The amount will be calculated in the same way as a pension for a spouse or civil partner and so will generally be up to half of your pension.

What happens if my circumstances change?

You can withdraw your nomination at any time by writing to the address overleaf, quoting your full name, date of birth and either your National Insurance number or Pension number. Alternatively, you can just complete a new Nomination form.

Please note: any nomination is automatically cancelled if you marry or enter into a civil partnership.

For full details about the adult dependant's pension, please refer to the Scheme website, your Scheme booklet or the latest Rules (available on request from BT Pension Scheme Member Support). In the event that the information in this form conflicts with the Rules, the Rules prevail.

Contact us

We have a dedicated team on hand to support you. If you have any questions about anything included in this form, please get in touch:

Talk to us: 0800 731 1919 (Monday – Friday 8:30am until 5:00pm)
+44 (0) 20 3023 3420 (international)
Email us: member@btps.co.uk
Write to us: BT Pension Scheme, Sunderland, SR43 4AD